

# Wine Tourists in Central Otago: An analysis of their characteristics, perceptions and experiences

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LEaP Research Report No. 39  
October 2017

Land Environment & People



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**Image 1**

**Vineyard overlooking Lake Dunstan**

(Photographer: Charlotte Thompson, 2015)

Land Environment and People Research Report No. 39  
2017

ISSN 1172-0859 (Print)

ISSN 1172-0891 (PDF)

ISBN 978-0-86476-376-1 (Print)

ISBN 978-0-86476-377-8 (PDF)

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## **Acknowledgements**

We wish to thank all the participating Central Otago wineries for providing survey locations, and for being hospitable during the data collection period.

Appreciation is also given to Matt Evans for volunteering to be a research assistant on this project. In addition, a special thank you to Matt Dicey and James Dicey for arranging accommodation over the survey period.

We would like to thank Mike Mackay for his conscientious reviewing of an earlier draft of this report, and for his helpful suggestions for improvements. Finally we would like to thank all the respondents for giving their time and participating in this research project.

This report has been prepared on behalf of Lincoln University. It is the result of a student summership, funded by Lincoln University, and with the in-kind support of the Central Winegrowers Association (COWA).

**Image 2**  
**Rainbow over Mt Difficulty Wines**



(Photographer: Charlotte Thompson, 2015)

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Series URL: <http://hdl.handle.net/10182/580>

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## Executive Summary

In the summer of 2014/2015, research was conducted in the Central Otago wine region to determine the characteristics, perceptions and experiences of international and domestic tourists visiting wineries in the area. The research was conducted utilising a questionnaire, with 178 respondents interviewed across 17 locations in the Central Otago region. The study explored the characteristics of Central Otago wine tourists, including their socio-demographic profile and wine consumption behaviour, their experiences in the region, including their experiences of winery visitation, patterns of activity and expenditure, and their perceptions of the destination image of Central Otago.

Two thirds of respondents were international visitors (primarily from Australia, USA and UK) and the remaining third were domestic visitors to the Central Otago region. There were slightly more female respondents than male respondents across the sample, which was relatively young also, with half of all respondents between 18 and 35 years of age. The majority of respondents were well educated, with three quarters having achieved a degree or higher degree.

The vast majority of respondents were travelling with either a partner or spouse, or with family and/or friends, and most were visiting Central Otago on holiday. Less than half of all respondents were staying in Central Otago overnight, with many staying in Queenstown or Arrowtown, just outside the surveyed region. Of those staying in the region, domestic respondents were staying in the region for six nights, on average, compared to three nights for international respondents. The most popular activities for the respondents (excluding winery visitation) in the region were restaurant dining, visiting a bar or pub, and bushwalking, with more domestic than international visitors participating in each of these activities. The sample contained a substantial proportion of repeat visitors; a quarter of international respondents had previously visited Central Otago, as had nearly all the domestic respondents.

The mean average regional spend per person for all respondents was \$443 (median: \$213). Domestic visitors reported a higher mean spend (\$598) in Central Otago than international visitors (\$371), in part due to their longer average length of stay in the region. Restaurant meals accounted for the highest mean spend and gifts/souvenirs the lowest. Two thirds of respondents purchased takeaway wine (either from wineries, supermarkets or bottle stores), and of those who did spend, international respondents reported a slightly higher mean than domestic respondents.

Respondents were asked their opinion of the destination image of Central Otago and natural environment features dominated, with wineries or vineyards and the region's wine also featured. When prompted with a list of statements regarding the destination attributes of Central Otago, the high quality of regional produce, the hospitality and service, and the wide variety of satisfying culinary experiences offered in the region ranked most highly, followed by the region's wine tourism and wines. There was much less support for statements regarding the cultural heritage and interesting history of the region.

In terms of winery experiences in Central Otago, respondents discussed 307 winery visits as part of this study, with the average length of each winery visit being nearly one hour. The decision to visit a particular winery was a spur of the moment one for over a quarter of respondents, while a quarter made the decision at home, and another quarter while travelling elsewhere in New Zealand. The most important information sources for the decision to visit a winery were word of mouth, previous experience and online sources.

Of the winery experiences discussed, a large majority involved a wine tasting, and almost half resulted in wine being purchased to take away. Those who did not purchase wine cited the price of the wine,

and issues of luggage or travel restrictions as the reason. A minority of experiences involved a restaurant meal or a winery tour. Asked to describe the most enjoyable aspect of their winery experience, elements of the natural environment was mentioned most often, followed by the wine itself. The service quality received 37.1% mentioned that they most enjoyed the wine. A quarter of respondents mentioned some element of the service received as the most enjoyable element of their experience. Less than half of respondents suggested improvements that could be made to their overall winery experiences. Of those that did, the most frequently mentioned issue was the need for a wider range of eating options.

# Chapter 1

## Introduction

This research involved a face-to-face survey of international and domestic wine tourists who were visiting Central Otago, New Zealand in the summer of 2014/15. The goal of the survey was to provide an overview of visitors' perceptions and experiences of the region, and in particular their wine tourism experiences. The research also identified the socio-demographic characteristics of these wine tourists (e.g. age, gender, and place of residence) and their trip characteristics (e.g. length of stay, source of information, regional spend).

In total 178 respondents were surveyed at 17 locations in the Central Otago wine region. The primary location for interviews was at participating wineries, ranging from boutique cellar doors through to larger wineries offering additional experiential features such as restaurants and personalised winery tours, although additional sites included public parks and open spaces (see Section 2.1). Of the 178 respondents, 68.5% were international visitors and 31.5% were domestic visitors.

The following report presents the findings of this research. First, an overview of the wine industry and role of wine tourism in New Zealand is presented. Next, the methods utilised in the research, including recruitment of participants, survey locations, questionnaire design, and data analysis techniques are discussed. This is followed by the results and discussion sections which outline the key findings from the data collected and interpretation of these results. The conclusion of the report summarises the key implications of these research findings, and outlines suggestions for future research and the ongoing development of wine tourism in Central Otago.

**Image 3**  
**Landscape of Central Otago**



(Photographer: Charlotte Thompson, 2014)

## 1.1 Background

### 1.1.1 New Zealand wine industry

The New Zealand wine industry has evolved considerably over the past 30 years, dramatically increasing in size, and becoming recognised globally for producing fine quality wine. The wine industry has become an integral sector of New Zealand's economy, providing \$NZ1.33 billion in export

revenues in 2014 (New Zealand Wine, 2014). In 2014, there were 699 wineries and 35,313 vineyards involved in the production of 320.4 million litres of wine throughout the country (New Zealand Wine, 2014). The industry is dominated by the production of Sauvignon Blanc grapes, which has a market share of 72% (310,240 tonnes in 2014), followed by Pinot Noir (36,499 tonnes) and Chardonnay (28,985 tonnes) (New Zealand Wine, 2014).

Winemaking began in New Zealand with the early colonialists at the beginning of the 19th century, with the first known cultivation of grapes occurring in Kerikeri in 1819 (Howland, 2014). However, the first commercial vineyard did not start operating until 1863, when Charles Levet planted vines on the Kaipara Harbour (Dalley, 2012b). In 1895, Croatian born Romeo Bragato was employed to survey New Zealand to determine the potential of regional suitability for growing vines (Howland, 2014). Central Otago was a region recognised by Bragato as showing potential for growing grapes, however, this advice was largely ignored for nearly a century (Oram, 2004). Inspired by Bragato's findings, a few farmers began to develop small vineyards throughout New Zealand, however, the majority concentrated on cultivating either table grapes, or low quality grapes suitable for the production of inferior wine (Howland, 2014). This low quality wine, characterised by a high sugar content, dominated the wine industry until the late 1970s, when boutique lifestyle wineries became influential in the production of quality wine (Howland, 2014).

In the 1980s New Zealand's consumer behaviour began to undergo a transformation, with the beer drinking culture becoming replaced by one where wine was consumed with meals (Dawson, 2012). At the same time, an interest in local wine, as well as wine and food festivals was emerging (Dalley, 2012a). By the mid-1980s, quality New Zealand wine was gaining attention across the globe, with export quantities increasing 1000% between 1985 (792,761 litres) and 1995 (7,788,757 litres; New Zealand Winegrowers, 2005, in Howland, 2014). As the wine industry has continued to expand and evolve, the reputation for producing fine quality wines has firmly positioned New Zealand wine on the international map. Annual wine statistics demonstrating this growth shown in Table 1.

**Table 1**  
**New Zealand wine industry growth (1992-2014)**

<i>Industry measure</i>	<b>1992</b>	<b>2005</b>	<b>2014</b>
Registered wineries	166	516	699
Total national production (tonnes)	55 000	142 000	445 000
Total national production (litres)	41.6 million	102 million	320.4 million
Exports (\$NZ)	48.3 million	434.9 million	1.33 billion
Domestic volume (litres)	43.6 million	45 million	50.1 million
Major winery regions	Auckland (60) Hawke's Bay (20)	Marlborough (101) Auckland (90) Central Otago (82)	Marlborough (151) Central Otago (132) Auckland (114)

(Source: Wine Institute of New Zealand, 1993, in Howland, 2014; New Zealand Wine, 2014)

### 1.1.2 Wine industry in Central Otago

The Central Otago wine region is the southern-most wine region in the world, located at latitude 45° south in the South Island of New Zealand. Characterised by its long hot summer days, and harsh winters with low rainfall, Central Otago's semi-continental micro-climate provides a challenging environment for wine growing; however, these conditions are particularly favourable for producing quality wines, such as Pinot Noir.

Although Bragato's early findings showed Central Otago as having excellent potential for growing vines, the region did not undergo extensive development for close to a century, with commercial wine production commencing in 1987 (Central Otago Winegrowers Association, n.d.). By 1996, the region was cultivating 376 tonnes of grapes per annum, and 11 wineries had been established (New Zealand Wine, 2005). As shown in Table 2, the industry has expanded rapidly since this time; currently there are 132 wineries, with vineyards throughout the region producing 10,540 tonnes of grapes (New Zealand Wine, 2014). Pinot Noir is the dominant grape variety grown in the district; in 2013 accounting for almost 70% of all grape plantings (1356 hectares), with the next highest variety being Pinot Gris at 218 hectares (New Zealand Wine, 2015). Other grape plantings in Central Otago include Riesling (77ha), Chardonnay (45ha), Sauvignon Blanc (43ha) and Gewürztraminer (16ha) (New Zealand Wine, 2015).

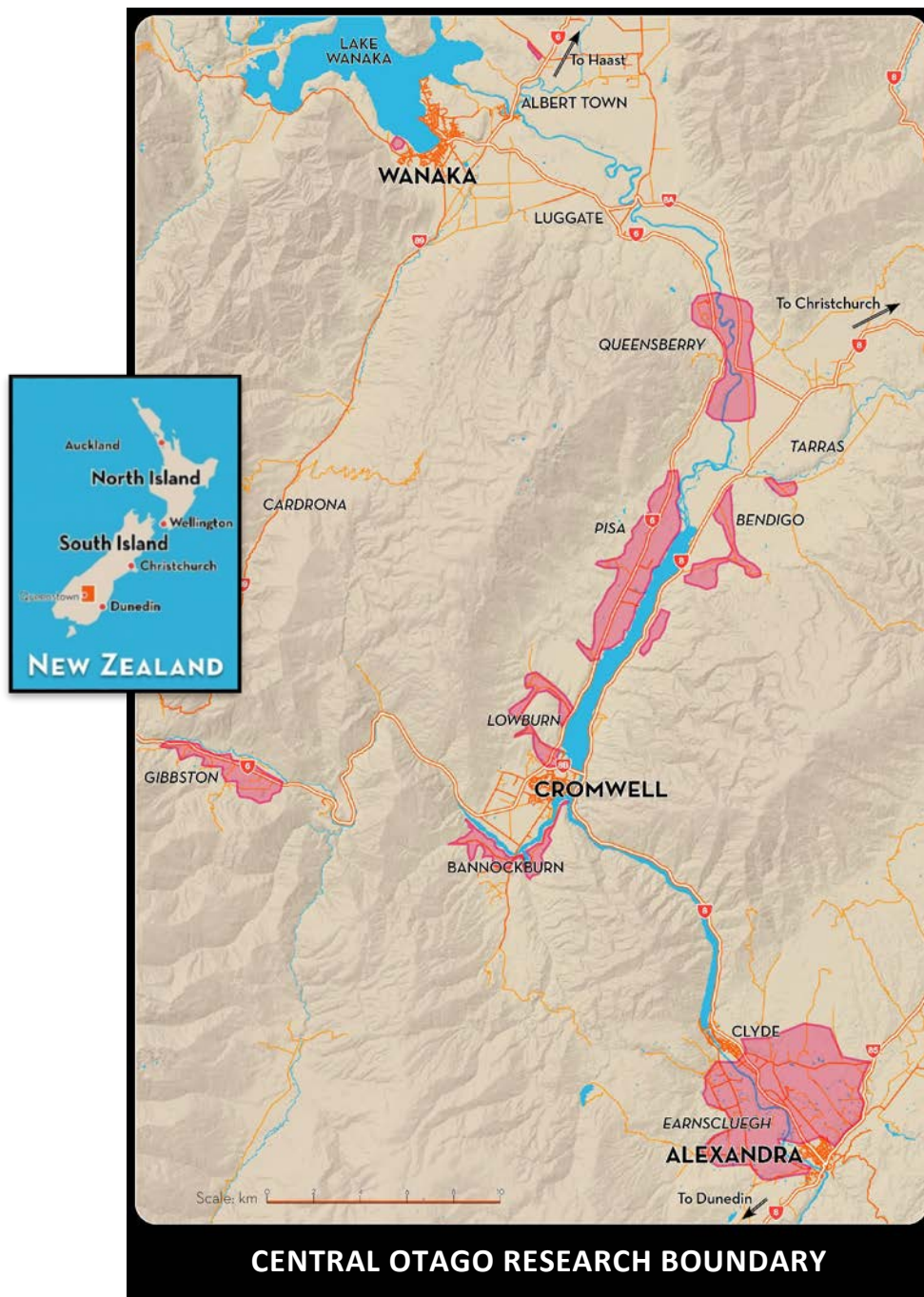
**Table 2**  
**Central Otago wine region (1996-2014)**

<i>Industry measure</i>	1996	1998	2000	2002	2004	2006	2008	2010	2012	2014
Wineries	11	23	39	46	75	82	95	111	120	132
Vineyards (hectares)	**	210	280	534	703	1253	1552	1540	1917	1979
Harvest (tonnes)	376	605	1009	1519	1439	4612	9495	6196	8115	10540

(Source: New Zealand Wine, 2005; New Zealand Wine, 2014)

The Central Otago wine region is divided into six sub-regions: Alexandra Basin, which includes wineries and vineyards throughout Alexandra and Clyde; Bannockburn; Bendigo; Cromwell Basin; Gibbston, which includes wineries and vineyards in Gibbston, Arrowtown and Lake Hayes; and Wanaka (see Figure 1) (Central Otago Winegrowers Association, n.d.).

**Figure 1**  
**Central Otago research boundaries**



As highlighted in Table 3, the sub-regions of Central Otago vary considerably in terms of number of wineries and conditions. They are characterised by a variety of different landscapes that contain a range of soil types, creating regional differences in grape cultivation and wine production (Central Otago Winegrowers Association, n.d.). The geology allows for soils such as fine sand, heavy silt loam and rocky schist, which are predominantly created from loess or alluvial deposits; although some locations produce soils sourced from glacial outwash or moraine (Central Otago Winegrowers Association, n.d.)<sup>1</sup>.

<sup>1</sup> Table 3 has been adapted from a list of Central Otago wineries featured on the COWA (Central Otago Winegrowers Association) website and wine map, and although the table outlines a number of wineries for each sub-region, wineries and vineyards that do not have COWA membership are not included in these figures.

**Table 3**  
**Central Otago wine sub-regions**

<i>Sub-region</i>	<i>Wineries/ vineyards</i>	<i>Climate</i>	<i>Environmental characteristics</i>
Alexandra Basin	14	Highest temperatures in NZ with broad diurnal shift	- Schist outcrops - Arid landscape
Bannockburn	15	Warm & dry	- Early grape ripening - Sandy, silty loam soils - Elevation: 220-370m
Bendigo	12	Warm	- Low altitudes: semi-arid, variable depth, free draining soils - High altitudes: shallow soils - Elevation: 220-350m
Cromwell Basin	27	Warm	- Largest portion of vines amongst sub-regions - Early grape ripening - Semi-arid - Flat to rolling high terraces & gentle slopes
Gibbston	11	Coolest sub-region	- Narrow valley - 250 hectares planted on south side of Kawarau River (north facing) - Highest sub-region with elevation 320-420m
Wanaka	2	Similar climate to Gibbston (slightly higher temperatures)	- Smallest sub-region - Elevation: 290-320m

(Source: Central Otago Winegrowers Association, n.d.)

### 1.1.3 Global wine tourism

One of the earliest definitions, by Hall et al. (2000, p. 3), describes wine tourism as “visitation to vineyards, wineries, wine festivals, and wine shows, for which grape wine tasting and/or experiencing the attributes of the wine region are the prime motivating factors for visitors”. While this definition is focused on the tourist experience and motivation, Getz (2000, p. 4) offers a broader definition, whereby “wine tourism is simultaneously a form of consumer behaviour, a strategy by which destinations develop and market wine-related attractions and imagery and a marketing opportunity for wineries to educate, and to sell their products directly to customers”; it is this definition which informs the current study, whereby the complex relationship between the needs of the wine and tourism industries and the wine tourists is acknowledged.

Wine tourism offerings are increasing globally, partly in response to rising consumer demand for these types of experiences, and also due to increasing competition by wine regions to attract the high spending wine tourist through strong marketing campaigns and product differentiation (Getz & Brown, 2006). There are a wide range of benefits possible from wine tourism involvement at both a regional and winery level. For a region, the benefits of wine tourism may include: regional differentiation; greater economic opportunities for other local businesses; and an increase of tourist volumes and extension of the visitation period (Baird & Hall, 2014). There are also numerous potential benefits for wineries including: increased customer awareness of the wine brand; strengthening of customer relationships that may result in brand loyalty; additional sales opportunities, with higher sales margins; direct customer feedback; marketing opportunities through loyalty programmes; and the opportunity to increase wine awareness levels through educating customers (Hall, et al., 2000). However, these benefits also come with risks and costs, including: staffing costs; availability of capital for building winery facilities; ability of winery to attract visitors; and detracting the management from

pursuing the core business focus (Hall, et al., 2000). In addition, compliance issues and government legislation may also impede on a winery's success (Alonso, Bressan, O'Shea, & Krajsic, 2015).

**Image 4:**  
**Summer grapevines, Central Otago**



(Photographer: Charlotte Thompson, 2015)

#### **1.1.4 New Zealand wine tourism**

Wine tourism first occurred in New Zealand in the 1970s, and has been evolving alongside the expansion of the wine and tourism industries throughout the country (Baird & Hall, 2014). Initially, opportunities for wine tourism were created at cellar doors to increase market sales, especially for smaller winegrowers who lacked industry support and distribution access (Baird & Hall, 2014). In New Zealand, cellar door sales became legalised in 1976, alongside changes to legislation that enabled wine to be taken into cafés (Baird & Hall, 2014).

Over the past decade, wine tourism in New Zealand has become increasingly popular amongst both domestic and international visitors. For the past five years, an average of 220,000 international visitors have visited wineries throughout the country per year (Tourism New Zealand, 2014). Generally, however, it is recognised that the majority of visitors to wineries in New Zealand are domestic visitors, or local residents visiting from surrounding areas (Alonso, Fraser and Cohen, 2007; Baird, 2012).

As Tourism New Zealand (2014) and Baird and Hall (2014) acknowledge, there is considerable variation in the visitor profile between wine regions, as well as at the individual winery level. For example, according to the Ministry of Economic Development (2009) Central Otago is one of the few regions in New Zealand where international wine tourists outnumber domestic wine tourists. The general profile of international wine tourists visiting wineries between 2009 and 2013 indicated that nearly one quarter were from Australia (47,500), followed by the USA (22,200) and the UK (20,700) (New Zealand Tourism, 2014). New Zealand Tourism (2014) visitor research also revealed that 53% of international wine tourists were female, and wine tourists are most likely to be travelling with their partner or spouse (51%). International wine tourists in New Zealand are most likely to be 25 to 34 (26%) or 55 to 64 (23%). Approximately 13% of all international visitors to New Zealand engage in wine tourism, and this visitor segment generally spend more overall on their trips to New Zealand than tourists who do not visit wineries (\$3700 average compared with \$2800 average; New Zealand Tourism, 2014).

There has been limited research on wine tourists and wine tourism in Central Otago, with most existing research relating to the visitor market overall. For example, the Tourism Strategy Working Group (2014) states that the profile of visitors to all Otago destinations are primarily domestic (75%), with

international visitors constituting 25% of all visitors. Australia is identified as the key international market for the region, while the German and UK markets have recently been increasing in significance (Tourism Strategy Working Group, 2014). In terms of wine tourism specifically, Mitchell's (2005) research on winery visitors to Central Otago indicated that these visitors were predominantly from the Generation-X and Baby Boomer generations; included a higher proportion of females than males; and were primarily high earning well-educated professionals (pp. 114-115). The highlights of these visitors' wine tourism experience in the region were the wine, service, vineyard settings, and natural scenery (Mitchell 2005). The study also revealed that wine tourism was a significant secondary generator of visitation to the region (Mitchell 2005). With a population base of 17,895 in Central Otago and a further 28,862 based in the Queenstown Lakes District according to the 2013 New Zealand Census (Statistics New Zealand, n.d.), wineries in Central Otago have a relatively small local market to supplement these visitors numbers, which can exacerbate issues of tourism seasonality.

**Image 5**  
**Boutique Gibbston Valley winery**



(Photographer: Charlotte Thompson, 2014)



## Chapter 2

### The Visitor Survey

#### 2.1 Methods

This research was conducted primarily through an interviewer-administered survey, face-to-face with wine tourists within the Central Otago region (see Figure 1 above). A deliberate decision was made by the researchers, in consultation with COWA, to exclude Queenstown and Arrowtown from the surveyed region, despite both locations being very important tourist destinations and often viewed as part of 'Central Otago'. This was done as these towns are not 'wine tourism' destinations and their inclusion would have swamped data from the wine region proper.

The survey consisted of a six page questionnaire (see Appendix 1), and on average took 12 minutes to complete, with some taking up to 20 minutes. The data collection occurred over two time periods, totalling 16 days of fieldwork during the periods 17<sup>th</sup> – 23<sup>rd</sup> December 2014 and 18<sup>th</sup> - 27<sup>th</sup> January 2015.

##### 2.1.1 Questionnaire Design

The questionnaire was designed to provide a broad indication of the socio-demographic and trip characteristics of winery visitors to Central Otago, as well as their experiences in the region and perceptions of these experiences. The outline of the questionnaire is listed by section below (also refer to Appendix 1 for full details):

- **Section 1:** The first section of the questionnaire asked questions related to the respondents' trip characteristics, including their usual place of residence and the planning and decision-making processes for this trip, including the trip's general purpose and their previous experiences of Central Otago.
- **Section 2:** In this section the respondents' perceptions of Central Otago were assessed in two ways; firstly by asking them to describe their unprompted impressions of the region, and then by asking them to rate their level of agreement with a number of destination image statements on a seven point Likert scale. This section also included questions on regional activity participation levels.
- **Section 3:** Section three investigated respondents' wine tourism experiences in Central Otago, including the winery attributes most important to their visit. This section also included questions regarding the number of wineries visited, factors in their decision to visit, the length of each winery visit, and their experiences at these wineries. Respondents were asked to highlight the elements most enjoyed at Central Otago wineries, or that required improvement.
- **Section 4:** In this section respondents were asked to provide details of their total expenditure on this trip to Central Otago, across eight different sub-categories of expenditure.
- **Section 5:** The final section of the survey included additional questions to help analyse the results. There were more socio-demographic questions for the respondents and their wine consumption behaviour, and some additional questions about the characteristics of the trip (length of stay, travel party, and accommodation).

##### 2.1.2 Recruitment of respondents

A total of 178 respondents were recruited across 17 locations within the Central Otago district, both at wineries and at other public locations, such as lakefronts, campgrounds, town streets, and other tourist facilities. The numerous locations used provided a good cross-section of respondents from both smaller and larger wineries, as well as from more visited and less visited locations. This enabled the opinions of a broad range of respondents to be obtained, including a mix of domestic and international visitors.

Screening questions were asked to ensure respondents met the requirements to participate, being that they were 18 years of age or older (the legal drinking age), be visiting from outside the Central Otago region, and had visited at least one winery in the region during their current trip. Visitor surveys such as those administered by New Zealand Tourism (2014) defines a New Zealand wine tourist as an international tourist, however, for the purpose of this research a wine tourist also included domestic tourists and day trippers from outside the defined region. Ethical guidelines were closely adhered to, and potential respondents who appeared intoxicated when approached were excluded from participation. Anonymity was also guaranteed to all respondents, with no follow-up contact details retained.

Respondents interviewed at wineries were approached as they left the premises. Initial plans to approach every third person to pass were discarded in favour of a 'next to pass' approach, as in general, the visitor numbers at many locations were relatively small meaning there could be a long wait for potential participants. At public sites, potential participants were approached on a 'next to pass' basis also. The majority of visitors approached at public sites did not match the research criteria, either due to the fact that they were local residents, or had not visited a Central Otago winery on their trip. Many domestic visitors cited the availability of local wine at supermarkets at a cheaper price than at the cellar door as a reason not to visit a winery, while some international visitors indicated their intention to visit a local winery but had not yet done so. Other international visitors indicated they had visited other winery regions in New Zealand already on their trip, particularly the Marlborough district, and felt no need to visit a winery in this region.

## 2.2 Sample size

As stated above, a total of 178 respondents were recruited in this study. The use of many recruitment sites enabled the inclusion of wine tourists within all six of the identified wine sub-regions of Alexandra Basin, Bannockburn, Cromwell Basin, Gibbston, Bendigo, and Wanaka. The distribution of respondents is illustrated in Table 4. It was initially hoped that a more even spread of wine tourists throughout the sub-regions would be achieved. However, due to variations in visitor numbers between the locations and a high volume of day trippers travelling from nearby Queenstown, wineries and tourist locations within Gibbston were disproportionately represented (39.3%). There was also a slight over-representation of visitors to the Wanaka region (24.2%), while wine tourists to the Bendigo region (1.7%) and the Alexandra Basin region (1.1%) were under-represented in this research.

The rate of refusal was approximately 30%. Of those that did refuse to participate, approximately half claimed to have time constraints. An estimated 40% of refusals was due to a language barrier; most of these potential respondents appeared to be of Southeast Asian descent. The final 10% declined on the basis that they were not interested in participating.

**Table 4**  
**Survey location (n=178)**

<i>Survey location</i>	<i>Percentage</i>	<i>Frequency</i>
Gibbston	39.3	70
Wanaka	24.2	43
Cromwell Basin	19.1	34
Bannockburn	14.6	26
Bendigo	1.7	3
Alexandra Basin	1.1	2

The number of respondents (n=178) was slightly lower than the targeted sample size, however it is large enough to conduct statistical analysis with considerable confidence. Reasons for the lower than

anticipated sample size included the relatively low numbers of visitors to wineries during the January survey period, partly due to very hot weather. It was noted also that visitation to wineries often peaked early to mid-afternoons, meaning that during this period only a small proportion of visitors could be interviewed, while at other times of the day the interviewer was idle. For future research, it might be appropriate to employ a team of interviewers to capture the busy afternoon period at several wineries simultaneously, or alternatively, a self-complete survey could be distributed by staff at wineries or an invitation to participate in an online survey distributed at the wineries.

### 2.3 Data analysis

Most of the data collected in the questionnaire were quantitative, and were analysed using the SPSS (Statistical Package for Social Science) software package. All data were analysed using descriptive statistical techniques such as *t*-means tests and chi square tests. Subsamples were analysed by the type of tourist (domestic or international) and some questions were assessed using other socio-demographic characteristics (for example age and gender). Responses to the open ended questions were entered into a Microsoft Excel spreadsheet and then assessed for themes based on existing knowledge and research about wine tourism.

**Image 6**  
**Wine barrels**



(Photographer: Charlotte Thompson, 2015)



## Chapter 3 Results and Discussion

### 3.1 Socio-demographic characteristics

A series of questions were asked in order to generate a profile of wine tourists to the Central Otago region.

#### 3.1.1 Place of residence

The survey sample consisted of respondents from 20 different countries, including New Zealand (see Table 5). Of this sample 68.5% were international visitors and 31.5% were domestic visitors. The most common place of residence for international visitors was Australia (18.0%), followed by the USA (12.9%), and then England (12.4%). This figure aligns with research conducted by New Zealand Tourism (2014), which indicates that New Zealand's most prominent international wine tourism markets were Australia, USA, and the UK. As acknowledged above, respondents from Asian countries may be under-represented in the sample due to a language barrier.

**Table 5**  
**Place of residence (n=178)**

<i>Place of residence</i>	<i>Percentage</i>	<i>Frequency</i>
New Zealand	31.5	56
Australia	18.0	32
United States of America	12.9	23
England	12.4	22
Germany	5.6	10
France	3.9	7
Spain	2.2	4
Canada	1.7	3
Singapore	1.7	3
Denmark	1.1	2
Finland	1.1	2
Holland	1.1	2
Ireland	1.1	2
Japan	1.1	2
Switzerland	1.1	2
United Arab Emirates	1.1	2
Belgium	0.6	1
Hong Kong	0.6	1
Scotland	0.6	1
Taiwan	0.6	1

Other studies of wine tourists conducted within New Zealand reveal a different proportion of domestic and international visitors. For example, Alonso et al, (2007) found almost two thirds (61.3%) of responding wine tourists in New Zealand were domestic, and only 35.3% international visitors. This is

a similar finding to other recent New Zealand research by Baird (2012) who reports that according to the estimates of winery managers, approximately 57% of winery visitors are domestic. This difference may be a factor of the timing and location of the interviews, or may reflect a higher propensity of international visitors to visit wineries while in Central Otago; it does reflect the already noted higher proportion of international wine tourists to domestic wine tourists reported in this region (see Ministry of Economic Development, 2009).

As shown in Table 6, Queenstown was the most common place of residence for domestic respondents (21.4%), with the majority of these visitors being on a day trip to the Central Otago region. The second most frequently cited place of residence for domestic respondents was Auckland (19.6%). Eight respondents (14.3%) came from Christchurch/Canterbury with all but one of these respondents being Christchurch residents. The remaining domestic respondents lived in various locations throughout the North and South Island. Perhaps surprisingly, only six domestic respondents resided in Dunedin, the nearest major city to Central Otago.

**Table 6**  
**Place of residence: domestic visitors (n=56)**

<i>Place of residence: domestic visitors</i>	<i>Percentage</i>	<i>Frequency</i>
Queenstown	21.4	12
Auckland	19.6	11
Christchurch/Canterbury	14.3	8
Other North Island	14.3	8
Dunedin	10.7	6
Southland	8.9	5
Wellington	8.9	5
Other South Island	0.0	0

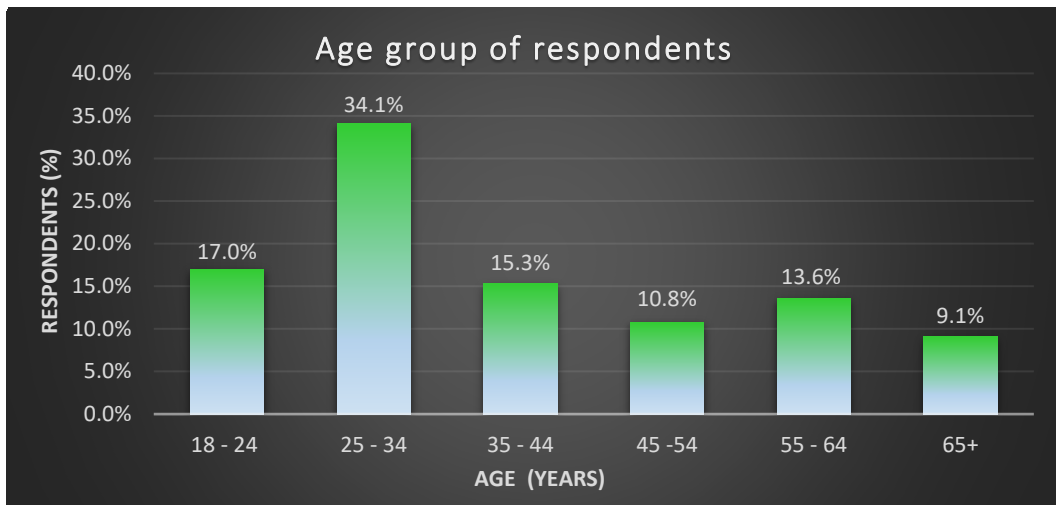
### 3.1.2 Gender

The survey sample (n=178) is slightly skewed toward female respondents (56.7%) in comparison to male respondents (43.3%), which matches other recent wine tourism research in New Zealand. For example, New Zealand Tourism (2014) figures suggest 53% of international wine tourists are female and 47% male. Mitchell and Hall (2001) found also more females than males wine tourists in New Zealand overall.

### 3.1.3 Age

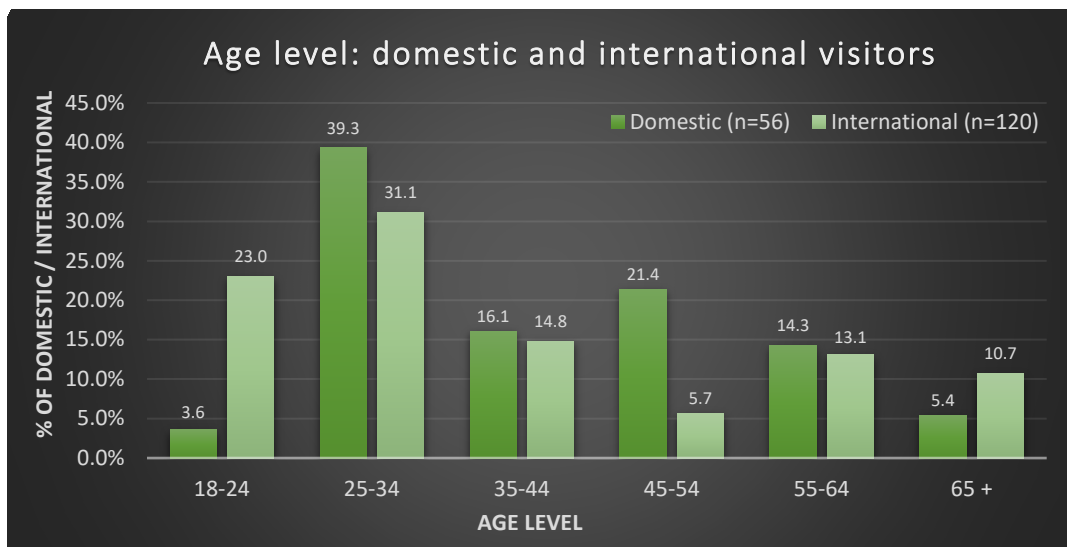
In the current study, half (51.1%) of respondents were under 35 years of age (see Figure 2), with a relatively even spread of respondents in age categories 35 and over. Again, this is broadly in line with the New Zealand Tourism (2014) profile of the international wine visitor, which states that between 2009 and 2013 the largest proportion of wine tourists were 25 to 34 years of age. Baird (2012) also argues that the New Zealand wine tourist is generally a younger, well educated segment. Mitchell and Hall's (2001) research on New Zealand winery visitation indicated that the majority of respondents (49.6%) were aged between 30 and 49 years, and respondents under 30 years accounted for only 18.4% of responses; the present sample has a somewhat younger profile.

**Figure 2**  
Age group of respondents (n=176)



Further analysis illustrated in Figure 3 reveals that international respondents were significantly younger than domestic respondents ( $\chi^2= 20.343, p< .01$ ), with over half (55%) aged between 18 and 34 years of age, and almost a quarter (23%) under 25 years of age. By comparison, over half (55.4%) of the domestic visitors were aged between 25 and 44 years of age, and 21.4% were 45-54 years, compared with only 5.7% of international respondents. The slightly older age of domestic respondents may reflect the timing of the surveying during the New Zealand school holidays, when these age groups may be travelling with children. The distribution represented here is broadly reflective of wine tourists witnessed by the researcher during the research period in Central Otago.

**Figure 3**  
Age level of respondents: domestic and international (n=176)

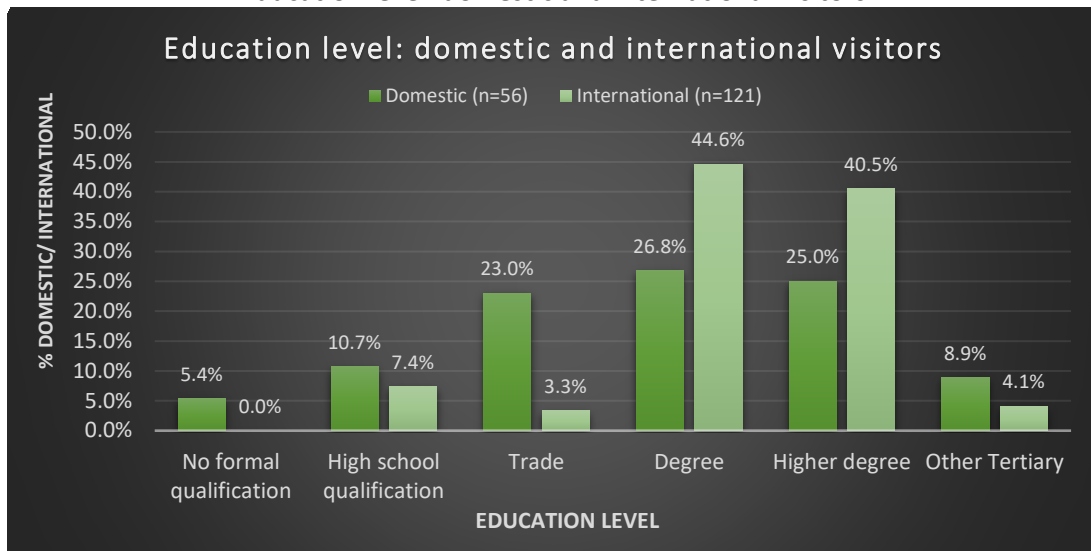


### 3.1.4 Education

The majority of respondents in the current survey were well educated, with 74.6% having achieved a degree or higher degree (for example a masters or doctorate); a finding reflected in other recent research (e.g. Baird, 2012). A comparison of domestic and international respondents reveals that the international segment were more highly educated than the domestic segment; 44.6% of international visitors having obtained a degree and a further 40.5% holding a higher degree. By comparison, 26.8% of domestic visitors had obtained a degree and 25.0% had achieved a higher degree (Figure 4). Chi

square analysis reveals that these differences in educational achievement between domestic and international tourists are statistically significant ( $\chi^2= 30.033, p< .001$ ).

**Figure 4**  
**Education level: domestic and international visitors**



### 3.2 Wine consumption behaviour

Given the focus of this study on wine tourism, it was felt that an understanding of the wine consumption behaviour or respondents was of interest. These findings are outlined in this section.

#### 3.2.1 Wine consumption behaviour

When questioned about their wine consumption, two thirds of respondents (66.7%) were drinking wine at least a few times a week, with only 19.9% consuming wine less than once a month (see Figure 5). Interestingly, 4.1% of these wine tourists reported that they never consumed wine, suggesting that wine tourism is not just an activity for wine consumers.

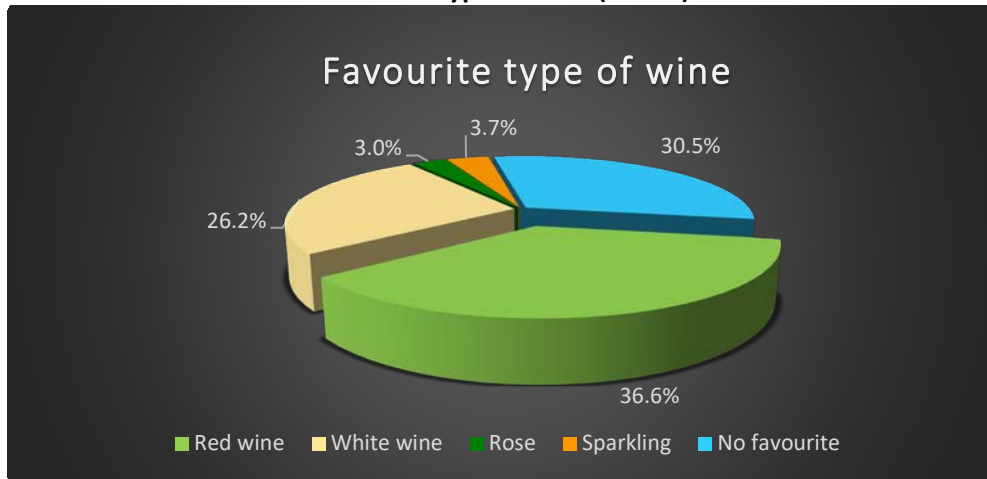
**Figure 5**  
**Wine Consumption (n=171)**



### 3.2.2 Favourite wine type

When asked to identify their favourite wine type, red wine was most frequently mentioned by respondents as a favourite (36.6%), followed by still white wine (26.2%; see Figure 6). Nearly a third of respondents (30.5%) stated that they didn't have a favourite wine style, and for some this was due to seasonal variations in their consumption patterns. Red wine was the favourite for slightly more international respondents (38.7%) than domestic respondents (32.1%), however this difference was not statistically significant.

**Figure 6**  
Favourite type of wine (n=164)



### 3.2.3 Favourite wine style

Over one third of respondents (39.2%) claimed to have no favourite wine style, with again seasonal or situational differences in preference influencing responses (see Table 7). Of those that did identify a favourite wine style, seventeen different wine styles were mentioned, with the most popular styles being Pinot Noir at 22.2%, and Sauvignon Blanc at 16.5%.

**Table 7**  
Favourite wine style or variety (n=158)

<i>Favourite wine style or variety</i>	<i>Percentage</i>	<i>Frequency</i>
No favourite	39.2	62
Pinot Noir	22.2	35
Sauvignon Blanc	16.5	26
Chardonnay	4.4	7
Pinot Gris	3.2	5
Shiraz	3.2	5
Riesling	2.5	4
Cabernet Merlot	1.3	2
Grenache	1.3	2
Syrah	1.3	2
Bordeaux blend	0.6	1
Champagne	0.6	1
Fermented grape juice	0.6	1

Gewürztraminer	0.6	1
Malbec	0.6	1
Marcillac (French appellation, red wine)	0.6	1
Merlot	0.6	1
Pinot Rose	0.6	1

### 3.3 Trip characteristics

This section of the report provides an overview of the trip characteristics, including decision-making process, patterns of activity and experiences of these visitors to Central Otago.

#### 3.3.1 Number of visits to Central Otago

Close to half (45.3%) of all respondents were repeat visitors to Central Otago; a very sizeable proportion. Those who had been to Central Otago previously were asked how many times they had previously visited, and of these respondents, over half (53.8%) had visited ten times or more. Just under a quarter of international respondents (23.1%) had visited Central Otago on at least one prior occasion, in comparison to 92.7% of domestic visitors (see Table 8). Interestingly over a third (37%) of international respondents who had visited Central Otago before had been over ten times, and almost two thirds (62.7%) of domestic respondents had visited over ten times.

**Table 8**  
**Number of previous visits to Central Otago (n=172)**

<i>Number of previous visits</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic % n= 55</i>	<i>International % n=117</i>
No previous visit	54.7	94	7.3	76.9
1	4.1	7	3.6	4.3
2	6.4	11	7.3	6.0
3	3.5	6	7.3	1.7
4	4.1	7	9.1	1.7
5 - 9	2.9	5	7.3	0.9
10+	24.4	42	58.2	8.5

#### 3.3.2 Purpose of visiting Central Otago

The majority of respondents stated the main purpose for their visit to Central Otago was for a holiday/holiday activities (83.1%). There was an even spread in responses across the remaining categories of recreation (5.1%), visiting friends and family (3.9%), business (2.2%), and other (5.1%). These results include many respondents who are defined as day trippers (56.2%), yet they predominantly considered their visit to Central Otago to be for holiday purposes or activities, suggesting that their day in Central Otago was part of a holiday in the broader region, including Queenstown. International respondents were primarily on holiday, with 90.2% describing this as the main purpose of their visit, in comparison to two thirds of domestic respondents (67.8%). One respondent commented that they were visiting the region specifically for the wine tasting (as directed by Lonely Planet), while another stated also their reason for visiting was purely for the wines.

**Table 9**  
**Purpose of visiting Central Otago (n=178)**

<i>Purpose of visit</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic %</i>	<i>International %</i>
Holiday	83.1	148	67.8	90.2
Recreation	5.1	9	8.9	3.3
Visiting friends & family	3.9	7	7.1	2.5
Business	2.2	4	7.1	0.0
Passing through	0.6	1	0.0	0.8
Other	5.1	9	8.9	3.3

### 3.3.3 Decision to visit Central Otago

When asked when they made the decision to visit Central Otago, almost three-quarters of respondents (71.3%) made the decision before leaving home, including 75% of domestic visitors, and 69.7% of international visitors. Another 20.8% of respondents stated that the decision to visit the region was made while travelling elsewhere in New Zealand, and this included almost a quarter (22.1%) of international visitors and 17.9% of domestic visitors. For 5.1% of respondents, the decision to visit was a spontaneous one, while 2.8% had decided to visit Central Otago while traveling in another country.

### 3.3.4 Travel party

Respondents were questioned about who they were travelling with on this trip, and nearly half (47.2%) stated that were travelling with their partner or spouse, 45.5% were travelling with family and/or friends, and 6.8% were travelling alone (see Table 10). The relatively high proportion of domestic visitors travelling with family is likely due to the interviewing occurring during New Zealand school holidays.

**Table 10**  
**Travel party (n=176)**

<i>Travel Party</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic %</i>	<i>International %</i>
Alone	6.8	12	5.4	7.5
Partner/spouse	47.2	83	50.0	45.8
Friends	13.1	23	8.9	15.0
Family	25.6	45	21.4	27.5
Family & friends	6.8	12	14.2	3.3
Interest Group	0.6	1	0.0	0.8

### 3.3.5 Length of stay in Central Otago

Over three quarters of the respondents staying overnight in Central Otago (81.6% of those staying overnight; 43.2% of sample) were staying less than a week, as illustrated in Table 11. Nearly a third of overnighting respondents were staying for 3-7 nights (30.3%; 13.1% of total sample), however, over half of respondents were staying only one or two nights. Four respondents were staying for more than sixty days. The mean average length of stay for overnight visitors, excluding those visiting for more than 60 days, was 4 nights. There was a substantial difference when comparing means of domestic and international visitors, with domestic respondents staying for twice as long (mean: 6 nights; median: 4 nights) as international respondents (mean: 3 nights; median: 2 nights).

**Table 11**  
**Number of nights in Central Otago (n=176)**

<i>Number of nights</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic %</i>	<i>International %</i>
Day trip only	56.8	100	54.5	57.9
1	10.8	19	7.3	12.4
2	11.4	20	3.6	14.9
3 to 7	13.1	23	20.0	9.9
8 to 14	4.0	7	7.3	2.5
15+	4.0	7	7.3	2.5

### 3.3.6 Overnight visitors to Central Otago

As highlighted above, just over half of the visitors to Central Otago wineries were day trippers who were not staying overnight in the region. The proportion of international and domestic respondents visiting the region on a day trip was very similar; 54.5% of all domestic respondents and 57.9% of all international respondents. As is indicated in Table 12, of the 43.2% who specified they were staying overnight in the region over two thirds (68.7%) were staying overnight in Wanaka, which is the largest destination within the survey boundaries and with the most accommodation; it was also the sub-region where a quarter of all interviews occurred. The second most cited overnight destination was Cromwell, with 14.5% of respondents staying a minimum of one night here. The remaining visitors were spread over six different locations: Bannockburn, Clyde, Luggate, Glendhu Bay, Alexandra and Tarras, with the spread amongst domestic visitors much greater than the international visitors. None of the visitors were staying in the Gibbston Valley, site of the largest proportion of surveys, possibly due to a lack of accommodation facilities and the close proximity to Queenstown.

**Table 12**  
**Location stayed at overnight in Central Otago (n=76)**

<i>Location</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic % n=26</i>	<i>International % n=50</i>
Wanaka	68.7	52	57.7	74.0
Cromwell	14.5	11	19.2	12.0
Bannockburn	5.3	4	3.8	6.0
Clyde	5.3	4	11.5	2.0
Luggate	2.6	2	3.8	2.0
Glendhu Bay	1.3	1	3.8	0.0
Alexandra	1.3	1	0.0	2.0
Tarras	1.3	1	0.0	2.0

### 3.3.7 Accommodation in Central Otago

Of the respondents that were staying overnight in Central Otago there was a broad range, and relatively even split, of accommodation types being used. As shown in Table 13, Hotel accommodation was the most frequently mentioned choice (18.7%), followed by hostel or backpackers (17.3%), and private home (17.3%). For the international visitors, the largest portion were staying in a hostel or backpackers (24.5%), followed by hotel accommodation (14.3%) and freedom camping (14.3%).

**Table 13**  
**Accommodation utilised in Central Otago (n=76)**

<i>Type of accommodation</i>	<i>Percentage</i>	<i>Frequency</i>
Hotel	18.7	14
Hostel / backpackers	17.3	13
Private home	17.3	13
Motor camp / camp ground	14.7	11
Freedom camping	10.7	8
Bed & breakfast	8.0	6
Motel	6.7	5
Other	4.0	3
Holiday Home	2.7	2

### 3.3.8 Overnight location outside of Central Otago

For respondents staying the previous night outside of Central Otago, the vast majority were staying in nearby Queenstown (78%) or Arrowtown (12%) as shown in Table 14.

**Table 14**  
**Location stayed at outside of Central Otago (n=100)**

<i>Location</i>	<i>Percentage</i>	<i>Frequency</i>
Queenstown	78.0	78
Arrowtown	12.0	12
Haast	3.0	3
Hawea	3.0	3
Aoraki / Mt Cook	2.0	2
Auckland	1.0	1
Kingston	1.0	1

### 3.3.9 Central Otago destinations

There were thirteen Central Otago destinations identified by respondents as places that they had visited, or intended to visit, on their trip to the region (see Table 15). Wanaka was the most frequently mentioned destination (67.4% of respondents), followed by Cromwell (51.1%) and Gibbston (50%). The next most frequently mentioned destination of Bannockburn was visited by less than one fifth of respondents (16.9%). This finding may be due to the disproportionate number of interviews conducted at Gibbston wineries and tourist locations (39.3%; see Section 2.1.2). It may reflect also the fact that the majority of respondents were on a day trip, and therefore did not have a great deal of time to explore the region.

**Table 15**  
**Destinations visited in Central Otago**

<i>Destination</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic %</i>	<i>International %</i>
Wanaka	67.4	120	75.0	63.9
Cromwell	51.1	91	62.5	45.9
Gibbston	50.0	89	51.8	49.2
Bannockburn	16.9	30	28.6	11.5
Alexandra	7.9	14	10.7	6.6
Clyde	7.3	13	16.1	3.3
Tarras	5.6	10	8.9	4.1
Cardrona	3.4	6	1.8	4.1
Pisa	2.8	5	5.4	1.6
Bendigo	1.7	3	0	2.5
Luggate	1.7	3	3.6	0.8
Lowburn	1.1	2	1.8	0.8
Queensbury	1.1	2	1.8	0.8

*(Multiple response question)*

The proportion of domestic respondents who reported visiting a destination was in most cases higher than international respondents, with the exceptions being Bendigo and Cardrona. This may be due to a higher proportion of domestic respondents staying in less frequented locations such as Clyde, Luggate and Glendhu Bay however it may also be due to a greater familiarity with the region, given 58.2% of domestic respondents had been to Central Otago more than ten times. While a relatively even proportion of domestic and international visitors had been to Gibbston, there were marked differences in the proportions visiting other destinations, including Bannockburn (28.6% of domestic visitors compared to 11.5% of international visitors).

### 3.3.10 Activities in Central Otago

Respondents were read out a list of fourteen different Central Otago activities and asked to identify which ones they had participated in, or intended to participate in, during their visit. The results of this question are presented in Table 16.

**Table 16**  
**Central Otago activity participation**

<i>Activity</i>	<i>Percentage</i>	<i>Frequency</i>	<i>Domestic %</i>	<i>International %</i>
Had/intended to have a meal in a restaurant	77.0	137	83.9	73.8
Visited/intended to visit a bar or pub	62.4	111	73.2	57.4*
Took/intended to take a bushwalk	59.6	106	71.4	54.1*
Visited/intended to visit a museum, historic building or historic site	50.0	89	48.2	50.8
Shopped/intended to shop for gifts or souvenirs	48.3	86	37.5	53.3*
Visited/intended to visit a botanic garden or park	44.9	80	51.8	41.8
Learned/intended to learn about the European history and culture of region	30.3	54	32.1	29.5
Visited/intended to visit an art gallery or craft studio	30.3	54	39.3	26.2

Cycled/intended to cycle on a cycle path or trail	25.8	46	33.9	22.1
Learned/intended to learn about the Māori history and culture of region	25.8	46	23.2	27.0
Participated/intended to participate in an adventure activity	23.0	41	19.6	24.6
Took/intended to take a scenic tour or cruise	20.2	36	25.0	18.0
Attended/intended to attend a Māori cultural show	3.9	7	1.8	4.9

(Multiple response question) \*significant at .05 confidence level

The most common activity for respondents to have participated in, or to intend to participate in, on their trip was having a meal in a restaurant (77.0%), followed by visiting a bar or a pub (62.4%), or going on a bushwalk (59.6%). Quite surprisingly given the reputation of the region, less than a quarter of respondents stated that they had participated in, or would participate in an adventure activity (23%) and only slightly more had cycled, or intended to cycle on a cycle path or trail (25.8%). There were significant differences between domestic and international respondents in participation rates for some activities. According to chi square analysis, domestic visitors were significantly more likely to participate in bushwalking than international visitors (71.4% cf. 54.1%) and to visit to a bar/pub (73.2% cf. 57.4%), perhaps reflecting greater time spent in the region. International visitors were more likely to shop for gifts and souvenirs in the region (53.3%) than domestic visitors (37.5%).

### 3.4 Expenditure in Central Otago

The respondents in this survey contributed to the Central Otago economy in a number of ways. They were asked to estimate their total regional expenditure (per person) across eight categories: tours, restaurant meals (including wine), bottles of wine to take away, other food/refreshments, transportation (including petrol, excluding tours), accommodation, gifts/souvenirs, and other (including groceries and essentials), and results are presented in Table 17.

The total amount spent by these visitors to Central Otago was \$NZ 78,774, and the mean average spend per person was \$443. The median was substantially lower, however (\$213), indicating that a relatively small number of large spending respondents has skewed the mean higher. The mean total spend for domestic respondents was \$598, which was substantially higher than for international respondents, at \$371. This difference could partly be due to the difference in the length of stay in the region between domestic and international respondents.

**Table 17**  
**Total expenditure in Central Otago (n=178)**

<i>Expenditure Category</i>	<i>Total</i>	<i>Mean</i>	<i>Median</i>	<i>Range of expenditure</i>	<i>% respondents spending</i>
Restaurant meals	\$18054	\$101	\$50	\$14.50-\$1500	75.8
Accommodation	\$15034	\$84	\$0	\$14-\$1600	33.7
Bottles of wine ( <i>take away</i> )	\$10442	\$59	\$30	\$10-\$1200	67.4
Other	\$10146	\$57	\$0	\$2-\$2000	41.0
Transportation	\$8803	\$49	\$20	\$8-\$1000	54.5
Other food/refreshments	\$8457	\$48	\$15	\$4-\$1200	73.6
Tours	\$4629	\$26	\$0	\$5-\$1000	14.6
Gifts/souvenirs	\$4307	\$24	\$0	\$10-\$600	37.6
<b>TOTAL</b>	<b>\$78774</b>	<b>\$443</b>	<b>\$213</b>	<b>\$4-\$5600</b>	<b>97.8</b>

One aspect that affects the results displayed in Table 17 is that each expenditure category includes respondents who did not spend anything. These were generally respondents who were visiting on a day trip. If these respondents are excluded, the mean total spend (n=174) is \$453 (median: \$220), with a range showing a minimum spend of \$4 to a maximum spend of \$5600. While this doesn't affect the overall expenditure means and median significantly, it has a major effect in some categories. For example, the median for accommodation, tours and shopping is \$0, indicating that more than half of all respondents spent nothing in this category.

**Figure 7**  
**Regional mean spend domestic/ international visitors (n=134)**

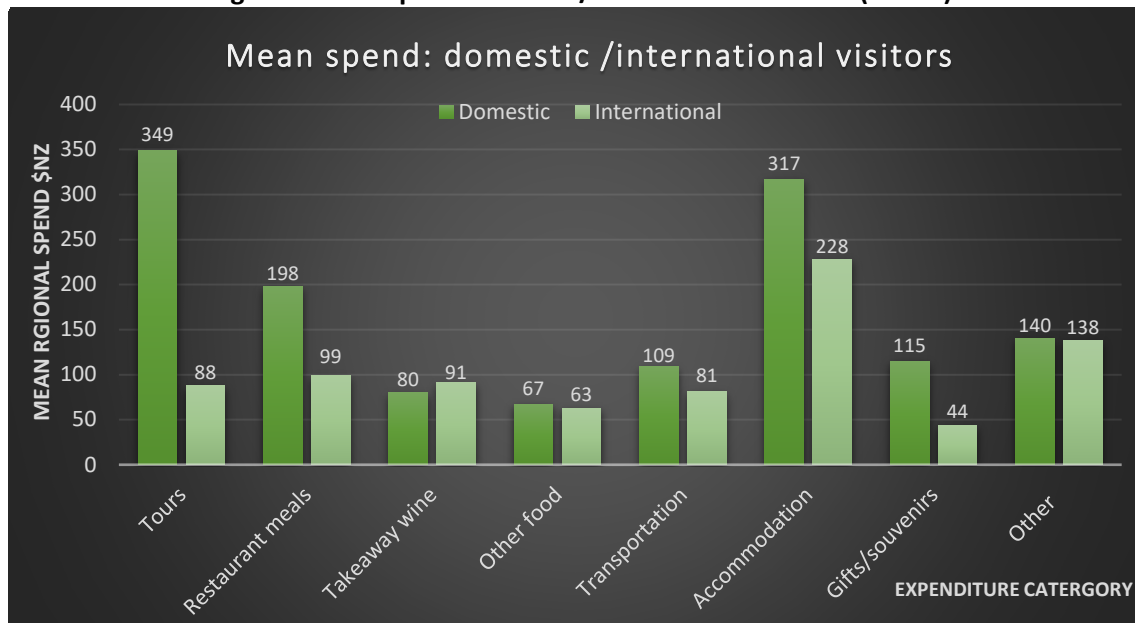


Figure 7 includes data only from respondents who had spent money in a category, meaning those that spent no money within Central Otago on this trip were excluded. What is clear from this is that in every category bar one, domestic respondents spent more in the region than international respondents. The expenditure category of restaurant meals had the highest visitor spend (\$18,054), and of those who did spend money on meals (n=134), the mean average spend was \$134 (median: \$100). Domestic visitors had a significantly higher mean spend in this category at \$198 (median: \$100) than international visitors with a mean spend of \$99 (median: \$60;  $t=2.448$ ,  $p<.05$ ).

The second highest expenditure category was accommodation, with a total spend of \$15,034. The respondents spending on accommodation (n=60) had a mean average of \$251 (median \$108). Again, domestic respondents had a higher mean spend (\$317) than international respondents who spent a mean average of \$228. This can be explained by domestic respondents' longer length of stay in the region, however this difference is not statistically significant.

Two thirds of respondents (67.4%) purchased wine to take away, spending a total of \$10,442. This included wine purchased at wineries, as well as other distribution outlets. For these respondents (n=120), the mean average spend was \$87 (median: \$50). There was no significant difference between domestic and international respondents on expenditure in this category, although as stated above, this is the one category where international visitors reported spending more on average than domestic visitors.

In most other categories there was no statistical difference in the expenditure level of domestic and international respondents, excluding those who spent nothing, with domestic respondents spending more than international respondents. The category labelled 'other' included any items not previously

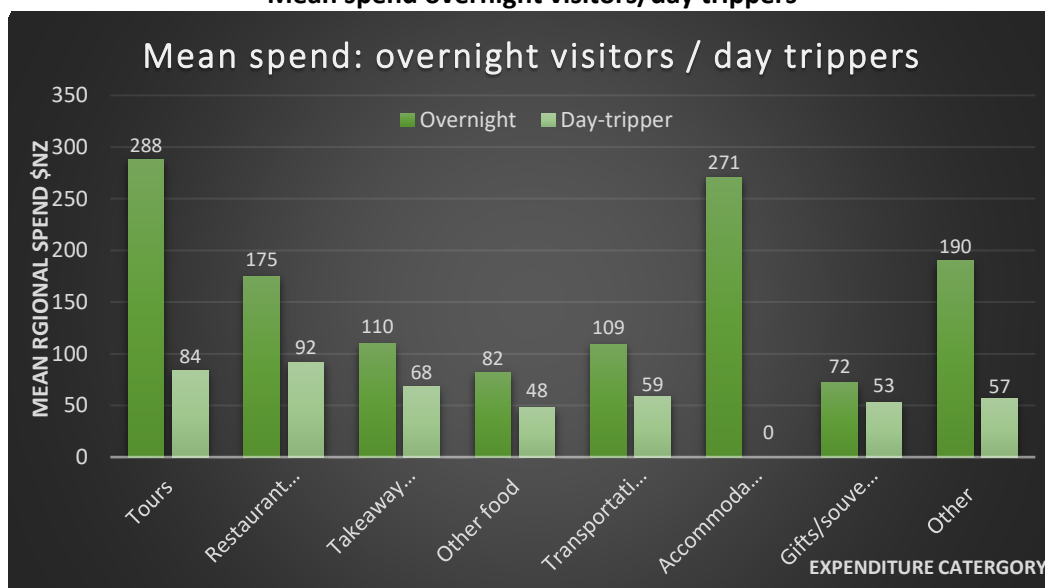
listed (including groceries and other essential items) and totalled \$10,146. For the 73 respondents who were spending money within this category, the mean average spend was \$139 (median: \$50). The mean average spend for domestic visitors (\$140) in this category was very similar to international visitors (\$138), however, the median for domestic visitors was much higher at \$50 in comparison to international visitors, at \$30. The total amount spend on transport was \$8803, and of those respondents spending money (n=97), the mean average spend was \$91 (median \$50). Domestic visitor mean expenditure on this category was higher than international visitors (\$109 compared to \$81), reflecting the fact that they stayed longer, and travelled more, in the region. The category of 'other food/refreshments' includes all drinks and take away food (and excludes groceries) and respondents spent a total of \$8457. The mean spend for respondents spending money on this category (n=131) was \$65 (median \$20). There was little difference in the mean spend between domestic visitors (\$67) in comparison to international visitors (\$63).

Respondents spent a relatively small amount on tours within the region (total: \$4629), with some stating their intentions to participate in tours in nearby Queenstown, or in Milford Sound. The small number of respondents spending money on tours (n=26), had a relatively high mean spend, at \$178 (median: \$100; with a range of \$995). Domestic visitors had a much higher mean and median in this category (mean: \$349; median: \$150), than international visitors (mean: \$88; median: \$60).

Expenditure was lowest in the gifts/souvenirs category, with a total of \$4307 spent. The mean spend for respondents spending money (n=67) was \$64 (median \$40), with a range of \$590 (minimum 10, maximum 600). Perhaps somewhat surprisingly, amongst those that spent in this category, domestic visitors spent significantly more than international visitors ( $t = 2.267$ ,  $p < .05$ ).

As highlighted above, much of the difference between domestic and international expenditure might be explained by different length of stay in the region. This is illustrated in Figure 8, which displays a comparison of expenditure between overnight visitors and day trippers. One important factor to consider is that these figures include those who are staying for more than three weeks, which can alter the results. Ideally it would have been good to have asked for a daily spend comparison also, to counteract this discrepancy. Those who stayed overnight spent substantially more, with a large amount being spent on accommodation, followed closely by restaurant meals. For respondents staying overnight the average spend was \$747, compared with \$205 for those respondents on a daytrip.

**Figure 8**  
**Mean spend overnight visitors/day trippers**



### 3.5 Impressions of Central Otago

This research sought to identify the impressions and image that visitors to Central Otago had of the region. These insights can help identify the key elements that stand out for visitors, as well as potentially highlight gaps in their knowledge of the region, or areas of weakness in their impressions of the region. This issue was addressed in two ways; through an open-ended question and the presentation of a list of statements in a Likert-scale.

#### 3.5.1 Overall impressions: open-ended response

The open-ended question “What would you say are the Central Otago region’s main characteristics or features?” resulted in a large number of responses, which were analysed to identify themes that emerged from the data. These identified themes were guided also by previous research on this topic (e.g. Bruwer & Lesschaeve, 2012; Bruwer, Pratt, Saliba, & Hirche, 2014).

Ten common themes were identified (see Table 18). Many respondents cited more than one feature in their response, and for this reason one response may have been coded in more than one category.

**Table 18**  
**Description of Central Otago characteristics and features (n=174)**

<i>Central Otago characteristics and features</i>	<i>% Respondents</i>	<i>Frequency</i>
Natural environmental features	80.0	142
Wineries/vineyards	24.1	42
Wine	21.3	37
Sports and recreational activities	19.0	33
Weather/climate	18.4	32
Ambience	8.6	15
Agricultural practices and products	8.0	14
Heritage	4.6	8
Service staff and local residents	4.0	7
Food	1.7	3

*Multiple response question*

Natural environmental features was a relatively broad theme, and was by far the most frequently mentioned category of response. In total, 80% of respondents mentioned some element of the natural environment as a prominent characteristic or feature of Central Otago. Mountains and lakes were the most frequently cited features in this category, however, other elements referred to included schist rocks, waterways, and landscape in general. When making reference to these terms, they were commonly expressed in terms of their beauty, with the following comments being typical:

- *“I expected it to be beautiful, but this is more so”*
- *“Overwhelming beauty of nature”*
- *“Wow - everywhere you turn is absolutely beautiful”*

**Image 7**  
**Ruby Island, Lake Wanaka**



(Photographer: Charlotte Thompson, 2014)

The next most frequently mentioned characteristic or feature of Central Otago was the wineries and vineyards, with just under a quarter of respondents remarking on this feature in some way (24.1%), with many respondents making positive comments about the wineries, for example *“great wineries”*, and *“small, intimate, and very personal”*, while others alluded to the diversity of the vineyard locations, such as:

- *“Very different in the winery region, with vineyards in amongst mountains”*
- *“Vineyards and orchards, with a beautiful backdrop of mountains and the Kawarau Gorge”*

The third most frequently mentioned characteristic or feature was wine (21.3%). Many respondents enthusiastically stated that the main feature of the region was *“the wine”* and other comments regarding wine tended to be favourable, and included comments such as: *“amazing wine”* and *“wineries of wonderful wine”*. Several respondents stated that they perceived *“pinot noir”* to be a main regional feature.

Nearly one fifth of respondents mentioned sports and recreation activities (19%), which included adventure activities, such as bungee jumping and skiing/ snowboarding, as well as hiking, cycling/cycle trails and water sports. This is an important category, due to the destination also being marketed towards outdoor recreationalists, including those interested in adrenaline activities. Typical comments in this category included:

- *“Lots of outdoor activities, like bungee, rafting, and walking”*
- *“Nice hiking tracks in the mountains”*
- *“Recreational activities such as walks, kayaking and general physical activities”*
- *“Adrenalin activities”*

An additional 18.4% of respondents stated that weather or climate was a main characteristic or feature of Central Otago. Comments about weather were generally very positive, such as *“great weather”*, *“warm weather”* and *“beautiful weather”*. Typical responses regarding the climate conditions are outlined as follows:

- *“The climate and dry air, it’s like a complete change in a short distance - this is the place to come”*
- *“Dry warm summers and chilly winters”*
- *“Warm and dry in the rain shadow of the Alps”*

Other respondents referred to the ambience of the region, highlighting the relaxed, peaceful, and laid-back atmosphere of the region (8.6%). Agricultural practices and products were also mentioned by 8% of respondents, including the fruit and cherry trees as well as the farms. Heritage was a main feature or characteristic for a small proportion of respondents (4.6%), who commented on the history, goldfields and old stone cottages. The friendly and hospitable nature of the Central Otago residents and service staff was mentioned (4.0%) and a couple of respondents (1.7%) mentioned the food in the region.

**Image 8**  
**Central Otago vineyard**



(Photographer: Charlotte Thompson, 2014)

### 3.5.2 Impressions of Central Otago: Likert scale question

Having answered an unprompted, open-ended question about their impressions of the region, respondents were presented with a list of statements about Central Otago and asked to rate each statement on a scale of 1 to 7, '1' being 'strongly agree', and '7' being 'strongly disagree'. The means of the responses to these statements (overall, and by domestic and international respondents) are presented in two tables; Table 19 presents results for the positive statements, and Table 20 presents resulting means on the negative statements. *T*-tests, assessing the means of domestic and international respondents' impressions, reveal that most of these means are significantly different statistically.

**Table 19**  
**Level of agreement with positive statements regarding Central Otago**

<i>Positive statements regarding Central Otago</i>	<i>Mean</i>	<i>Domestic Mean</i>	<i>International Mean</i>
The produce of Central Otago is of very high quality <i>(n=165)</i>	1.96	1.69	2.09*
Service staff and sales personnel take care of their customers here <i>(n=171)</i>	2.15	2.45	2.01*
The wines of Central Otago are world class <i>(n=151)</i>	2.30	1.61	2.64***
The region offers a wide range of satisfying culinary experiences <i>(n=134)</i>	2.55	2.10	2.83***
Wine tourism is an important part of the attraction of Central Otago <i>(n=169)</i>	2.61	2.37	2.72
Central Otago has an interesting history <i>(n=131)</i>	2.73	2.12	3.13***
The region offers a wide range of cultural heritage experiences <i>(n=133)</i>	3.29	2.89	3.50*

1= strongly agree, 7= strongly disagree \* significant at .05 confidence level; \*\* significant at .01 confidence level; \*\*\* significant at .001 confidence level

Overall amongst the respondents the strongest level of agreement was with the statement *the produce of Central Otago is of very high quality*, with 95.2% of respondents agreeing with this statement (answering from 1-3 on the scale), and providing a mean average of 1.96. Both domestic and international rated this statement highly, although domestic respondents rated it significantly higher; domestic respondents had a mean of 1.69, with 96.3% agreement, and international respondents had a mean of 2.09, with 94.6% agreement.

A total of 78.4% of respondents agreed that *the region offers a wide range of satisfying culinary experiences*, and the proportion of respondents that disagreed with this statement was only 7.5%. When means are compared, again domestic respondents had a very significantly higher mean of 2.10 (90.2% in agreement), compared with international respondents (mean of 2.83, with 71.1% in agreement).

The statement *service staff and sales personnel take care of their customers here* also rated very highly amongst respondents, with an agreement level of 87.7%, and a mean average of 2.15. When comparing domestic and international respondents, it is interesting to note that international respondents rated this statement significantly higher than domestic respondents. This could reflect different experiences in the region or greater exposure to a range of service environments, or cultural differences in expectations and priorities. It should be acknowledged, however, that both groups of respondents rated this feature positively; 84.9% of domestic visitors agreeing with the statement and 89.0% of international visitors.

Over three quarters of respondents (76.8%) agreed with the statement *the wines of Central Otago are world class*. There was a very significant difference however, between answers provided by domestic visitors in comparison to international visitors, with 93.9% of domestic visitors agreeing with the statement, providing a mean average of 1.61, in comparison to 70.5% of international visitors, with a mean average of 2.64, indicating that domestic respondents are more positive about the quality of Central Otago wines (although both samples are very positive overall). It is important to note that this difference may be due to international visitors not being very familiar with the regional wine brands, with further analysis indicating that 21.6% of international respondents gave a 'neutral' response (4 on the Likert scale), which alters the average. What this might suggest is the region could do more to highlight the world-class reputation of the region's wines in promotional material.

Over three quarters of respondents (76.9%) agreed with the statement that *wine tourism is an important part of the attraction of Central Otago* with a mean score of 2.61, and no statistically significant differences between the samples. A small proportion (13.6%) of respondents disagreed with this statement. Amongst domestic respondents 85.2% agreed that wine tourism was an important part of the attraction. Just under three quarters of international respondents agreed that wine tourism was an important part of the attraction

The remaining statements in this list relate to the history and cultural heritage of the region. There is no doubt that the promotion of this wine region at the level of the region and individual wineries highlights the history of Central Otago (see Fountain & Dawson, 2013; Fountain & Dawson, 2014). However compared with many wine regions in the world, Central Otago has a short history of wine growing, and a relatively short history of human. Despite this, the majority of respondents agreed that *Central Otago has an interesting history*. There were differences by place of origin, however, with 84.6% of domestic visitors, and a much lower 60.8% of international visitors agreeing with the statement, resulting in statistically significant differences in means (2.12 domestic; 3.13 international). It is important to note that very few international respondents actually disagreed with this statement, instead, over a third (34.2%) gave a neutral rating ('4'). This may suggest that many international visitors to Central Otago are unaware of the rich historical past of the region.

Going beyond the history itself to the availability of *a wide range of cultural heritage experiences* just over half of respondents (53.4%) agreed with this statement. This included agreement from 66.7% of domestic respondents and 46.6% of international respondents. On this statement almost a third (30.1%) of all visitors gave a neutral rating, including 17.8% of domestic visitors, and almost half of the international visitors (46.6%). This lack of knowledge may reflect the fact that the majority of respondents were in the region for only one day, and may not have a vested interest in learning about the heritage or experiencing cultural aspects and activities in the region. However, given the cultural and historical resources in the region, and the fact that many studies have shown that wine tourists tend to have the characteristics more generally ascribed to ‘cultural tourists’, including an interest in learning more about heritage, culture and the arts (Getz & Brown, 2006; Williams & Kelly, 2001), it may be worth increasing publicity about these opportunities in Central Otago.

**Image 9**  
**Stone building, Central Otago**



(Photographer: Charlotte Thompson, 2015)

The remainder of the statements presented to respondents to assess would generally be considered ‘negative’ statements (see Table 20). Again, the lower the mean, the more the respondents agree with this negative statement.

**Table 20**  
**Level of agreement with negative statements regarding Central Otago**

<i>Negative statements regarding Central Otago</i>	<i>Mean</i>	<i>Domestic mean</i>	<i>International mean</i>
Central Otago is an unsophisticated destination <i>(n=166)</i>	5.43	5.17	5.56
The region is difficult to get around <i>(n=163)</i>	5.17	5.30	5.11
Central Otago is too expensive for the experiences & services provided <i>(n=164)</i>	4.46	4.55	4.43
This wine region is not too different from any other wine region <i>(n=159)</i>	4.45	4.90	4.25*

\* significant at .05 confidence level; \*\* significant at .01 confidence level; \*\*\* significant at .001 confidence level

The first of these statements *Central Otago is an unsophisticated destination* may not, in fact, be considered a ‘negative’ concept; many people enjoy the ‘unsophisticated’, perhaps conjuring up the idea of ‘back to basics’, ‘non-commercial’ and ‘authentic’ experiences and people. On this question there were no significant differences between domestic and international respondents, with domestic respondents giving a mean score of 5.17, somewhat disagreeing with the statement, compared to the international visitor mean of 5.56. A total of 7.1% of domestic respondents agreed with the statement, in comparison to 9.8% of international respondents. As stated above, the fact that domestic visitors were more likely to agree with the ‘unsophisticated’ nature of the region is not necessarily a negative;

is a quality that is often appreciated by domestic holiday makers, looking for unspoilt places to bring their families. However, it is also the case that some tourist experiences or products, including high end gastronomic or wine tourism experiences, may struggle in a region which is perceived as 'unsophisticated' and visited for this quality.

The statement *this wine region is not too different from any other wine region* was agreed with by 32.7% of respondents, with a mean of 4.45, in the neutral range, with significantly different means between domestic and international respondents. The domestic respondents were more likely to disagree with this statement with 26.0% in agreement and 66.0% disagreeing, in comparison to international respondents, 35.8% of who agreed and 46.8% disagreed. This could perhaps be a reflection of the international respondents' greater exposure and experience with other wine regions, particularly those in other parts of the world. One respondent commented that the Central Otago wine region was "*very much like coastal California/Santa Barbara or the Mediterranean, with many vineyards*".

Over half the respondents (50.6%) disagreed with the statement *Central Otago is too expensive for the experiences and services provided*, however the overall response was a neutral mean of 4.46, with almost a quarter of respondents (23.2%) giving the statement a neutral response. This relatively high proportion of neutral responses may be due to a lack of experience with the region, and could be influenced by a number of factors, including the fact that many respondents were at the beginning of their Central Otago trip; many visitors were only spending one day in the region, and may have only had free wine tastings so far; and some were not intending to spend anything in the region. A quarter (25.5%) of domestic respondents and 26.6% of international respondents agreed that the region was too expensive.

Only 19% of respondents agreed with the statement *the region is difficult to get around*, resulting in a mean of 5.17. Domestic and international respondents had comparatively similar means, with 16.7% of domestic respondents and 20.2% of international respondents agreeing with this statement.

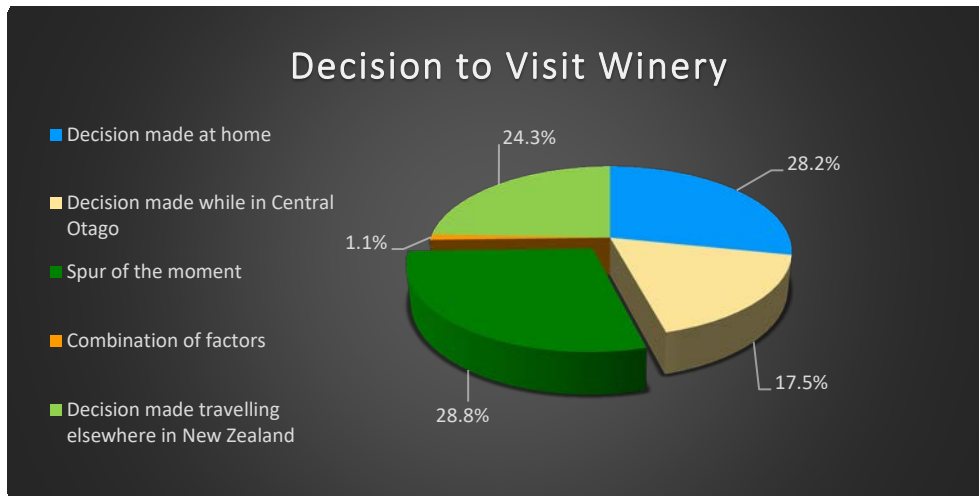
### **3.6 The experience of wineries in Central Otago**

This section focuses on the experiences the respondents in this study had as wine tourists in Central Otago. The discussion includes analysis of the decision-making process for the last winery visited, including when and where the decision to visit was made, and the information sources utilised to make the decision. This is followed by a discussion of various aspects of the winery experience, including the activities participated in, the length of visit and total expenditure at the winery, the factors enjoyed most at the wineries and suggestions for improvements.

#### **3.6.1 The decision to visit the winery**

Respondents were asked about their pre-visit decision-making in relation to their most recent winery visit in Central Otago (see Figure 9). Over a quarter of respondents (28.8%) revealed that they had invested relatively little effort in planning their visit and decided to visit a winery on the spur of the moment. Amongst the remainder there was a fairly even proportion who made their decision to visit while at home (28.2%), while travelling elsewhere in New Zealand (24.3%), or while based in Central Otago (17.5%).

**Figure 9**  
**Where was the decision made to visit winery? (n=177)**



Given the very different characteristics of the trips of respondents, this indication of ‘where’ the trip was made does not necessarily reflect ‘when’ the decision was made, or how much time was invested in the decision. For respondents that indicated their decision was made at home or while travelling elsewhere in New Zealand, they were further asked *when* this decision-making took place (Figure 10). Over half of respondents (50.7%) stated that it was within one week of the visit with nearly a quarter (24.1%) of decisions being made within 24 hours of the visit. Just under a third of respondents (30.5%), engaged in a planning process lasting over three months.

**Figure 10**  
**How long ago was decision made to visit winery? (n=41)**



### 3.6.2 Winery information sources

Respondents were asked to name all the sources they used to access information on the Central Otago wineries. The results are presented in Table 23.

**Table 21**  
**Types of information sources utilised to access wineries**

<i>Information Source</i>	<i>Percentage (n=175)</i>	<i>Domestic % (n=59)</i>	<i>International % (n=149)</i>
Word of mouth	40.6	28.8	36.2
Previous experience	16.0	32.2	6.0
Internet (unspecified)	15.2	8.5	14.8
iSite	9.7	3.8	10.1
Sign	8.0	3.8	8.1
Lonely Planet	5.1	0.0	6.0
Assorted brochures	4.5	3.8	0.0
Wine map	3.9	3.8	3.4
Google Maps	3.4	0.0	4.0
Other guide books	3.4	0.0	4.0
Tour group	3.4	0.0	4.0
Drive past	2.8	3.8	2.0
Industry knowledge	2.8	8.5	0.0
Assorted magazines	1.7	1.9	2
Familiar with wine	1.1	3.8	1.3

*Multiple response question*

The most frequent information source was word of mouth, which was mentioned by 40.6% of respondents, with the next highest category being the 16% who named previous experience as an information source. The third most frequent source was unspecified Internet search, which was mentioned by 15.2%. No other information source was used by more than 10% of respondents, with the next highest ranked sources being an iSite (9.7%) and signage (8%). It is interesting that 'traditional' sources – such as guidebooks, brochures and a winery map – remained as important as web-based sources; combined these sources were used by 16.9% of respondents. Perhaps surprisingly, word of mouth was a more important source for international respondents than domestic respondents; however, this may be accounted for by the relatively high reliance of domestic respondents on previous experiences. International respondents were more likely also to rely on both the internet and traditional guidebooks. It is interesting to note that no respondent mentioned using an app. as an information source, despite a Central Otago wine region app. being available.

The main source of information for respondents matched the overall results regarding information sources (see Table 22). Strong statistically significant differences were recorded for the use of signage, word of mouth and unspecified internet site, with international visitors more likely to access each of these as their main source of information, while guide books were only utilised by international respondents as an information source.

**Table 22**  
**Main source of information for visiting wineries**

<i>Main information source</i>	<i>Percentage (n=175)</i>	<i>Domestic % (n=53)</i>	<i>International % (n=122)</i>
Word of mouth	35.4	24.5	40.2***
Previous experience with wine/winery	19.4	47.2	7.4***
Internet (unspecified)	12.6	7.5	14.8**
iSite	5.1	1.9	6.6
Signage	6.9	0	9.8**
Guide book	5.7	0	8.2***
Other	4.6	9.4	2.5
Tour group	4.0	0	5.7
Drive past	3.4	5.7	2.5
Wine map	2.9	3.8	2.5

*Note: previous experience includes previous visits, wine consumption and industry knowledge*  
*\*significant at .05 confidence level, \*\*significant at .01 confidence level, \*\*\*significant at .001 confidence level*

These differences are not surprising, given that domestic respondents had more familiarity with the region through previous visits, as well as more experience with New Zealand wineries and wine regions in general, and therefore do not require as much information as international visitors do. International respondents reported that the word of mouth sources they used included information from local service personnel, as well as recommendations from other wineries, rather than advice from friends and fellow travellers.

### **3.6.3 Central Otago winery experiences**

Respondents were asked about their experiences of individual Central Otago wineries on their current trip. Where more than one winery was visited, the questions were asked about up to five winery visits. Data was recorded for winery visits across Central Otago for 26 wineries, which included nine wineries in Gibbston Valley, seven wineries in Bannockburn, seven wineries in the Cromwell Basin, and one winery each in the Alexandra Basin, Bendigo, and Wanaka sub-regions.

Amongst the 178 respondents, the experiences of 307 winery visits were discussed (an average of 1.8 winery visit per respondent). Respondents were asked also if they planned to go to any other wineries in the region and a further 34 planned winery visits were mentioned. An additional 12 respondents indicated that they would like to go to more wineries, but had not made a definitive decision as to which wineries these might be.

A range of questions were asked about the winery visits already completed, including the activities participated in at the wineries, the amount of time spent at each winery, and the amount of money spent per person on different activities or products and overall. Table 23 outlines the activities experienced by respondents at the wineries visited, including analysis by domestic and international respondents.

**Table 23**  
**Winery experience factors**

<i>Winery Experience</i>	<i>Winery Visit %</i>	<i>Domestic visit %</i>	<i>International visit %</i>	<i>% of all respondents</i>
Wine tasting	<b>84.7</b>	82.9	85.3	82.6
Bought wine to take away	<b>48.5</b>	51.2	46.7	57.9
Meal	<b>19.2</b>	26.8	16.4	30.9
Wine with meal	<b>13.6</b>	19.5	12.0	21.9
Winery tour	<b>9.8</b>	7.3	11.6	13.5
Joined loyalty programme	<b>6.8</b>	11.0	5.3	11.2

The activity respondents most frequently engaged in during a winery visit was wine tasting, with 84.7% of winery visits including this activity, and 82.6% of all respondents having experienced at least one wine tasting. Approximately half of all winery visits (48.5%) resulted in wine being bought to take away, and slightly more than half of all respondents (57.9%) reported buying wine to take away during at least one winery visit. The remainder of the activities listed were participated in during a smaller proportion of winery visits. Some of these, such as eating a meal or enjoying wine with a meal, or taking a winery tour, are available at a limited number of Central Otago wineries, so this result is not surprising. Results do show that nearly a third of respondents (30.9%) ate a meal at a winery at least once during their trip. For those that did have a meal (n=42), 71.2% bought wine to accompany it. What is somewhat surprising, and perhaps concerning, is the very small proportion of respondents (11.2%) that joined a loyalty programme, such as a mailing list, newsletter, or email distribution list, during their visit. as it is recognised that building brand loyalty can be a significant outcome of cellar door experiences (for example Charters, Fountain and Fish, 2009).

When international and domestic respondents are compared, it is apparent that domestic wine tourists were more likely than their international counterparts to buy a meal at a winery (with or without wine), to buy wine to take away and to join a loyalty programme. International wine tourists were more likely to taste wine and take a winery tour.

#### **3.6.4 Length of visit at wineries**

Data was collected from respondents for each of the (up to five) winery visits they had experienced to determine the total length of time they had allocated to winery visitation. The data provided from 302 visits was aggregated, and the mean average length of each winery visit was calculated at 57 minutes, with a range of 295 minutes (minimum: 5 minutes; maximum: 300 minutes). The median for the first reported visit (45 minutes) was longer than for all subsequent visits (30 minutes).

#### **3.6.5 Factors enjoyed most at wineries**

When asked an open-ended question about what they had most enjoyed about their winery visits the respondents mentioned a number of features, and these responses have been categorised by themes and presented in Table 24.

**Table 24**  
**Factors enjoyed most at Central Otago wineries (n=178)**

<i>Factors enjoyed most at wineries</i>	<i>Percentage</i>	<i>Frequency</i>
No comment	6.2	11
Destination features (natural environment)	42.1	75
Wine	37.1	66
Service staff	25.8	46
Atmosphere	13.5	24
Wine education	13.5	24
Other winery experiences (wine tasting/tours)	11.2	20
Food	9.6	17
Other built environment factors	7.9	14

*Multiple response question*

Destination features were mentioned by close to half of all respondents (42.1%). These responses focused solely on the natural environment and centred on the view, scenery, location, landscape, setting and surroundings, as the following statements typical of this category illustrate:

- *“The setting, - wineries tend to be in beautiful locations”*
- *“Fantastic panoramic setting”*
- *“Location, wine, and scenery; everything is special”*

This highlights the importance of winescape to the wine tourism experience (Bruwer & Lesschaeve, 2012), and reflects the findings of Mitchell (2005). Interestingly, the destination features were mentioned more often than the wine itself, which was the second highest mentioned set of responses (37.1%). Respondents commented positively on the wine quality and variety, in particular with favourable responses regarding the region’s Pinot Noir and Rosé.

Many previous studies have reported the importance of service quality to the winery experience (for example Charters, Fountain, & Fish, 2009; Charters & O’Neill, 2001). However, only a quarter of respondents mentioned this as an important factor in the enjoyment of their winery experience. For the respondents that did enjoy the hospitality of the winery, they identified personal qualities, such as friendly and welcoming staff, as well as commenting on the high level of professionalism. Some comments typical of this response include:

- *“The friendliness of staff, and approachable attitude that they have towards their customers”*
- *“People serving them are very well informed, they know the wines and how they are produced”*
- *“Staff were cheerful and welcoming”*

Another feature mentioned by a relatively small proportion of respondents was wine education. Respondents who did mention this as an important factor in their enjoyment of Central Otago wineries made positive comments regarding the experience of learning about wine and wine making, and hearing the stories directly from the owner, with the following comments being typical:

- *“Learning the history of the vineyard, and the way each wine is made”*
- *“Meeting the owner and having them explain how and why they got into the wine industry”*
- *“Learning about different vintages, and winemaking techniques”*

Carlsen and Charters (2006, p. 273) predict that “wine education will become more significant and wine tourism may grow as a means of furthering that education”, but at this stage it doesn’t seem that this element is central to the enjoyment of the winery experience for most visitors in Central Otago.

The theme ‘other winery experiences’ was mentioned by 11.2% of respondents, primarily featuring comments related to wine tasting and winery or vineyard tours. The small percentage of respondents who made reference to a wine tasting or tours made positive comments regarding the tours, and commented favourably on the wine tasting experience, particularly the free wine tastings, as well as the hospitality surrounding the wine tasting. The relatively small proportion of respondents that did take a winery tour reported the experience as a highlight of their winery visit, and some of the statements made that typify other respondents reasons include:

- *“The personal tour was unbelievable”*
- *“Seeing the barrel room and the wine”*
- *“First one I have been to where I’ve seen the grapes and had a tour”*
- *“The experience of trying the wine”*

A relatively small proportion of respondents (13.5%) cited the most enjoyed feature to be an element of the winery’s atmosphere. Within this theme, respondents cited a variety of aspects ranging from good climate through to the relaxed and laid back ambience and local attitude, which is also reflected in the welcoming of children and lack of tour buses. Exemplars of these statements included:

- ❖ *“Small, with not too many tourists or buses”*
- ❖ *“Unpretentious compared to US, and lot of places often think about kids”*
- ❖ *“Feeling of time stopping for a minute”*

**Image 10**  
**View from Bannockburn**



(Photographer: Charlotte Thompson, 2015)

Only 9.6% of respondents provided reasons relating to food and other produce as being one of the most enjoyable aspects of their winery visit. However, as previously mentioned, only a small portion of Central Otago wineries offered dining experience options. Of the comments made in relation to this theme, general food was referred to positively, such as the *“food is spectacular”*; and individual products were identified, including salmon, chocolate and cheese. Some respondents also commented that food was an important component of the whole winery experience, with one respondent stating that it must include *“the wine, the food, the view - it has to be the package”*. This

connection between wine tourism and food is recognised increasingly in literature on the topic, and may have important implications for wine tourism growth strategies (for example Smith 2000; Telfer 2003; Plummer et al. 2005; Hall & Sharples 2008; Alonso & Liu 2011 as cited in Baird, 2012).

The category 'other built environment features' includes physical structures, landscape elements, and vineyards, which have been differentiated from the natural destination features. Some of the commonly identified factors most enjoyed at Central Otago wineries by 7.9% of respondents included architectural design, which also included shaded outdoor seating areas; play areas or children; sculptures; and gardens.

### 3.6.6 Winery experience improvements

The respondents were asked to identify any specific improvements that could be made to their winery experiences in Central Otago. This open ended question was again analysed once the data had been organised within Microsoft Excel, and a number of themes emerged from these responses (see Table 25). It should be noted, however, that less than half of respondents had a suggestion for improvement, and these suggestions did not necessarily mean that respondents had had negative experiences, with only 18 respondents making a comment that could be construed as a negative assessment of their experience. It should be stressed also that some of the suggestions made could not be solved by the wineries alone, relating as they do to wider regional issues.

**Table 25**  
**Winery experience improvements**

<i>Winery experience improvements</i>	<i>Percentage</i>	<i>Frequency</i>
No suggestions	58.0	101
Range of eating options	16.1	20
Product offerings & purchasing options	12.1	14
Better information sources	9.7	12
Quality of service	9.7	12
Lower freighting costs	8.9	11
Palate cleanser	5.6	7
Free wine tasting	4.8	6
Transportation options	4.0	5

*Multiple response question*

The most frequent theme identified by respondents to improve their Central Otago winery experience was to provide a wider range of eating options. This category included suggestions for more opportunities for wine and food experiences; wine and food matching; more eateries, more mid-range priced food options, and the availability of local produce, cheese, platters and food in general at Central Otago wineries. As one respondent commented: *"if there was food served with the wine tasting I would have stayed longer"*. Another respondent saw the provision of food as part of a more complete experience which could be offered, stating *"more sit down tastings with stories and food, such as in the middle of vineyard"*.

Some of respondents believed their winery experience could be improved with greater flexibility and range of products and purchasing options. Several respondents thought wines or tours should be cheaper, while others wondered about more discounts for multiple purchases, or wine by the glass being sold as an option:

- *"Cheaper wine to buy to take away"*

- *“Flexible wine buying options, like purchase by the glass, it’s difficult when driving*
- *“New Zealand wine is cheaper in Germany, for the same wine”*

Although the need for better information sources was mentioned by a small number of respondents, those who did mention this point felt strongly about the issue. Some of these comments focused on the Central Otago Wine Map, and included comments about the clarity and availability of winery information on the map through to distribution and accessibility issues. It is important to note that during the fieldwork it was observed that availability of the maps was ample at some outlets, however at other places (including wineries with information racks and other information outlets) there were no maps available, or not prominently displayed. In terms of the content, several respondents made unfavourable comparisons with the Marlborough wine map, and stressed that the latter had more detailed information, allowing for greater flexibility with decision making. For example:

- *[Map] Needs more information: open hours, if do tasting and if charge, and be more accurate - some say ‘appointment only’ but they are open”*

Other information sources were highlighted as being in need of improvement, such as road and winery signage, insufficient directions, and issues with interpreting local maps. Comments were made also about a relative lack of online presence, which was described as *“sparse in comparison to other wine regions in New Zealand”*. Another respondent mentioned:

- *“More information online, as when you ‘Google’ “New Zealand Wines Central Otago”, it did not show, there was more information displayed regarding northern wineries”.*

Despite the high rating of hospitality and service in earlier questions about the region as a whole, 12 respondents highlighted hospitality and service at wineries as needing improvement. A range of service improvements were suggested, sometimes alongside discussion of some specific negative experiences. The primary focus of these comments was that the service experience should be more personalised and considerate, as the following highlights:

- *“More approachable staff with knowledge, a more personalised experience”*
- *“Helpful assistance upon entrance to winery, instead of a stand-offish person behind counter”*
- *“Keep the service personal, it’s a UNIQUE experience for us! Remember we don’t know your systems, be super friendly”*
- *“More huomaavainen (considerate) customer service”*

An additional 8.9% of respondents specified they would like to see a reduction in freighting costs, such as free shipping on multi buys, and clear advertising regarding freighting options. The remaining themes had relatively low response numbers and included a request for a palate cleanser between wine tastings such as a cracker or bread; free wine tasting, or a refund once a bottle has been purchased; options for transportation, such as a passenger or sober driver service. One respondent suggested transport by water taxi.

### **3.6.7 Importance of elements to the winery experience**

As well as the open-ended question, respondents were asked to rate the importance they placed on a range of winery experience elements during a winery visit, with respondents offered ratings along a seven point Likert scale, from ‘1’ being extremely important, though to ‘7’ being not at all important. The mean averages of these responses is presented in Table 26.

**Table 26**  
**Importance of elements to the winery experience**

<i>Winery experience elements</i>	<i>Mean</i>	<i>Domestic mean</i>	<i>International mean</i>
Wine are available to buy to take away <sup>(n=168)</sup>	1.6	1.4	1.7
Opportunity to taste a range of wines <sup>(n=168)</sup>	1.7	1.9	1.6
Attractive scenery at the winery <sup>(n=169)</sup>	2.1	1.9	2.2
Wine tasting free of charge <sup>(n=169)</sup>	2.4	2.6	2.3
Opportunities to learn about wine and winemaking <sup>(n=167)</sup>	2.5	2.8	2.3
Opportunities to relax and unwind <sup>(n=168)</sup>	2.5	2.0	2.7**
Hearing stories about wine growing and wine making <sup>(n=169)</sup>	2.6	2.8	2.4
Opportunities to try wine and food matching <sup>(n=168)</sup>	2.7	2.4	2.9*
Opportunities to socialise with friends and family <sup>(n=165)</sup>	2.9	2.7	3.0
Driving to the winery takes no more than one hour <sup>(n=164)</sup>	3.0	3.0	3.0
Being able to meet and talk to the winemaker <sup>(n=169)</sup>	3.0	3.2	2.9
Availability of a restaurant <sup>(n=167)</sup>	3.3	2.8	3.5**
Being able to take a guided tour around the winery and vineyard <sup>(n=169)</sup>	3.5	3.5	3.5
Children are welcomed and activities are available for them <sup>(n=162)</sup>	3.9	3.7	4.0
Availability of an organised tour to the winery/vineyard <sup>(n=167)</sup>	5.0	5.6	4.8**

*\*significant at .05 confidence level, \*\*significant at .01 confidence level, \*\*\*significant at .001 confidence level*

The most important elements of the winery experience for respondents related to the wine: being able to purchase wine to take away (1.6) and having the opportunity to taste a range of wines (1.7) were rated most highly. As reported above, domestic wine tourists were more likely to buy wine to take away during a winery experience, and international wine tourists were somewhat more likely to taste wine; these trends are reflected in the small mean differences on these measures between the segments. Being able to purchase wines to take away was somewhat more important for domestic respondents than international respondents, while the opportunity to taste a range of wines was slightly more important for international visitors, although the differences are not statistically significant. In fact *t*-means tests were undertaken to examine any differences in priorities between international and domestic respondents found no significant differences in the majority of means.

Other winery experience elements that had a relatively high mean (between 2 and 2.5), included attractive scenery, free wine tasting, education and learning opportunities, listening to stories about winemaking, and the opportunity available to relax and unwind. The high rating for the importance of scenery is unsurprising, given the frequent mention of scenery and winescape as an enjoyable factor in the respondents' experience, but the high importance given to education and learning opportunities, compared to the lower proportion of visitors who ranked this a highlight of their winery experience suggests there might be room for wineries to improve on this element, as was suggested by one respondent:

- *“Information on processing and growing, such as information stations (plaques) as part of a tour, with information on grapes (yield/age)”*

Both international and domestic respondents placed relatively high importance on free wine tasting, with international respondents placing slightly more importance on this statement. International visitors also had a higher mean (2.3) than the domestic visitors (2.8) for the importance given to the educational aspects of the winery experience, and ranked higher the role of hearing stories about winemaking to the winery experience (2.4 international, 2.8 domestic) but again none of these

differences are statistically significant. One area where domestic and international visitors did differ significantly is domestic respondents' prioritising of the opportunity to relax and unwind (2.0) compared to international visitors (2.7). Another result which was significantly more important for domestic respondents was the availability of a restaurant (domestic 2.8; international 3.5). These results might indicate that domestic visitors prefer their winery experiences to be slightly more 'laid back' and less wine-focused, and information about the wines and winemaking is a somewhat less important feature of the experience for them. The fact that more domestic wine tourists experienced a winery meal than international wine tourists further reinforces that difference.

Domestic and international respondents scored identical means for the winery experience elements driving takes no more than an hour (3.0), and options for a guided tour around the winery operations (3.5).

Provisions available at wineries for children received a relatively neutral response from both domestic and international visitors, reflecting the fact that a minority of respondents were traveling with children, and therefore this was not an important factor, although domestic visitors rated this as more important than international visitors.

The least important winery experience factor was the availability of an organised tour to the winery, with a mean of 5.0 (somewhat unimportant). There was a significant difference on this element, with an organised tour being less important for domestic (5.6) than international (4.8) respondents, again reflecting the higher propensity of the latter to have experienced a winery tour on their trip to Central Otago. This may be a reflection also of the amount of self-drive international visitors who are visiting the region, as well as the inclusion of domestic visitors who may be using their personal motor vehicle. While mode of transport information was not gathered in this survey, observations by the researcher would indicate that the vast majority of those interviewed were travelling by car, and time restrictions may have stopped those in tour parties from stopping to complete a survey.

### **3.6.8 Winery expenditure**

Expenditure data for Central Otago wineries was available for 305 of the 307 visits reported by respondents. In total, almost a fifth of respondents (18.2%) reported that they spent nothing on any winery visit, however two respondents reported spending \$529 each during their winery visits overall. The total expenditure for respondents aggregated across all wineries was \$9740.50. The median spend across wineries was \$30.00. The mean total spend per person at wineries in the Central Otago region was \$55.34, however, excluding the respondents who spent nothing, the mean total spend is \$69.21.

While the mean spend for domestic and international visitors was quite similar, with domestic respondents giving a mean of \$50.31, and international visitors had \$57.69, a slightly larger proportion of international visitors reported spending nothing at a winery (19.2%) compared to 16.1% of domestic visitors. Once these respondents are excluded, the domestic mean spend was significantly lower at \$59.95, than the international mean spend (\$71.37)

As discussed in the previous section on expenditure in Central Otago, the mean total spend on all expenditure categories in Central Otago was \$442.54, in comparison to mean spend at wineries of \$55.34. The total spend of wine tourists in the Central Otago district was \$78,773.50 in comparison to total spend at wineries of \$9740.50. Acknowledging that some of the \$10,442 spent on wine to be taken away will be double counted, and some of the restaurant meals will have taken place at wineries, it is still clear that a relatively small proportion of the total money spent by these respondents in Central Otago has been spent on wine and wine tourism experiences.

The data from the wineries expenditure was assessed by age groups to look for any differences in mean and median totals, and the results are presented in Table 27. The figures displayed are based

on respondents who did actually spend something at Central Otago wineries, although there were difference by age group in the proportion spending nothing at the winery. Interestingly, respondents most likely to spend nothing were those aged over 65, or 55-64 years, although this latter category had the highest mean spend amongst those who spent something (\$118.88). The 35-44 age group were relatively high spenders, with a mean average spent (excluding those who spent nothing) of \$98.30 and the highest median spend at \$60 per person. The age groups most likely to spend money was the 45-54 year olds, nearly all of whom bought something, followed by the 25-34 age group. Perhaps not surprising, the 18-24 year olds spent least on average (\$36.15), however 80% did purchase something on their winery visit, which is a higher proportion than those 55 years and older.

**Table 27**  
**Total spend at at Central Otago wineries: Age group comparison (n=142)**

<i>Age group (years)</i>	<i>Mean (\$)</i>	<i>Median (\$)</i>	<i>% spending \$0</i>
18 - 24	36.15	26.50	20.0
25 - 34	55.51	35.00	10.2
35 - 44	98.30	60.00	14.8
45 - 54	75.17	50.00	5.3
55 - 64	118.88	55.00	29.2
65+	34.57	30.00	53.3
<i>All respondents</i>	69.21	39.50	18.4

*Excluding respondents who spent \$0*

### 3.6.9 Reason for not purchasing wine

Respondents were asked an open ended question regarding their decision not to purchase wine at any winery they had visited in Central Otago. It is important to note that some of the responses came from those who had purchased wine at some of the wineries, but not at every winery visited. Table 28 reveals six common themes emerging from the data, including: price; travel or luggage restrictions; wine considered unsuitable; non-wine consumer; wine not required; and freighting costs. Each of these will be briefly discussed below.

**Table 28**  
**Reason for not purchasing wine (n=175)**

<i>Reason for not purchasing wine</i>	<i>Percentage</i>	<i>Frequency</i>
No reason given	57.8	100
Price	13.1	23
Travel / luggage restrictions	9.1	16
Wine considered unsuitable	8.0	14
Non-wine consumer	5.1	9
Wine not required	4.6	8
Freighting costs	1.7	3

*Multiple response question*

The reason most frequently cited for not purchasing wine at a Central Otago winery was price (13.1%; 30.7% of those giving a response). This key theme included reasons given such as: high cost; budget restrictions; quality of wine did not match the price; and distribution channels supplied the wine for a lower cost, including local supermarkets, as well as in Australian outlets. Examples of these responses are quoted below:

- *“The cost, this is an expensive trip and country”*

- *“New Zealand wine is expensive”*
- *“No wines stood out in quality to be worth the price”*

The second highest ranking reason was luggage/travel restrictions (21.3% of comments; 9.1% of total sample). Reasons given by respondents for this theme included difficulties with transporting the wine, with respondents being on foot or bike or not having enough space in their vehicle; and issues experienced with airports and international travel, such as lack of clarity of wine allowance into their home country, or issues with carrying the wine in luggage or being restricted to carry-on luggage. Some typical responses are shown below:

- *“No room in the car while travelling”*
- *“Hard to take on the plane”*
- *“Not sure I can take it into the US”*

For almost one fifth of the respondents that did not buy wine (8.0% of total sample), the main reason for lack of purchase was the wine did not suit their personal taste. This included comments such as *“did not find anything unique enough”*, or comments about not liking Pinot Noir in general or these particular wine styles. A further 12% of respondents (5.1% of total sample) did not purchase wine because they were not regular wine consumers.

Another common theme identified in the data was those who cited that the purchase of additional bottles of wine would be surplus to their requirement on this visit (10.7% of comments; 4.6% of total sample). Some of the respondents mentioned that they already had bought enough or did not need any more at this time. Examples of the responses given include:

- *“Already had enough, but will look for distributors in the US”*
- *“Because I bought some in Marlborough”*

A very small proportion of respondents (4.0%, 1.7% of total sample) cited the main reason for not purchasing wine as high freighting costs, which included responses such as: *“cost of shipping to Australia is expensive”* and *“expensive freighting costs”*.

### **3.7 VIP experience**

At the request of the Central Otago Winegrowers Association, respondents were asked a final scenario question regarding their interest in participating in a ‘VIP Experience’ at a Central Otago wine. This VIP experience would include a private visit to a winery, tour of the vineyard and winery operations conducted by the winemaker, wine and food matching and barrel tasting of premium wines. The experience was priced at \$400 for half a day. The respondents rated the experience on a Likert interval scale from 1-7, with (1) being extremely interested and (7) being not at all interested.

Almost half of the respondents (49.4%) indicated that they were not at all interested in the experience (see Figure 11 VIP winery experience (n=160)). While only 2.9% were extremely interested, a total of 12.5% indicated some level of interest. Several respondents mentioned that they would be more interested in the experience if the price was lower; however, other respondents commented that wineries are already providing some of these elements free of charge, or should be, to enable greater volumes of sales to be made and customers to gain connection to the product.

Domestic visitor showed a higher level of interest in the experience, with 17.0% showing some level of interest. In comparison, 10.2% of international visitors showed some interest in the experience, with an additional 11.2% providing a neutral response (‘4’).

**Figure 11**  
**VIP winery experience (n=160)**



## Chapter 4

### Conclusion

This report has provided a comprehensive overview of the characteristics and experiences of wine tourists to Central Otago during the summer of 2014/2015. While the number of respondents is relatively small, a detailed picture has emerged about the experiences of these respondents in the regions and at the wineries they visited. The survey has found some significant differences in the characteristics and experiences of international visitors, compared with domestic visitors however. Overall we can describe the wine tourist in Central Otago as relatively young, highly educated and travelling with partners or families, and generally consume wine more than once a week.

Given that many of the domestic respondents are frequent visitors to the region – and a quarter of international respondents had visited before – it is unsurprising that they hold very positive views of the region. It comes as little surprise that the main regional destination attributes were identified as the natural environment, followed by wineries/vineyards and wine. Respondents generally agreed that the regional produce was of high quality; the wines of Central Otago were world class; the region offered a wide variety of satisfying culinary experiences; the hospitality and sales personnel take care of their customers; and that wine tourism is an important part of the region's attraction. These perceptions are reflected in the experiences of the respondents in the region too, the majority of whom visited a winery, pub or bar or restaurant in the region; with half also taking a bushwalk or visiting a heritage site, museum or historic building. These visitors spent considerably in the region, with an average spend of \$443, but a much lower median spend of \$213 reflecting the relatively large number of day trippers in the sample.

These wine tourists made 307 visits to wineries during their trip to Central Otago, with the main winery experience being wine tasting and buying wine to take away. A smaller proportion ate a meal at a restaurant or engaged in a winery tour, largely due to the limited availability of these activities. Perhaps somewhat surprisingly, a very small proportion of winery visitors joined a loyalty programme, such as an email distribution list or joined a loyalty programme. The median spend at wineries in the region being \$55.34, although close to 20% spent nothing. There was generally a close match between the features ranked as most important to a winery visit and the respondents' reports about the most enjoyable experiences. The most enjoyed aspects of the winery experiences were the destination features (natural environment) and the wine, which were the features rated most important. There are some potential gaps; for example the rating of the opportunities to learn about wine and winemaking and to hear stories about wine and the importance of wine making is very high, but these features were not often mentioned in discussions about what they had most enjoyed. This may be due to the relatively small proportion of visitors who experienced a winery tour, which is often where these sorts of stories are shared. In terms of suggestions for improvements, a wider range of eating options was most often mentioned by respondents, with some mentioning that the provision of food (through a restaurant, or wine and food matching experiences) would have extended and strengthened their experiences. However the opportunity of a 'VIP experience', involving these elements did not appeal to most respondents.

It is hoped that this research, and this report, will contribute to our understanding of the nature and characteristics of wine tourism in Central Otago, and may be valuable in future planning and decision making in the region. It is acknowledged that the timing of the survey over a short period of time one summer may mean that the snapshot presented here does not fully represent the characteristics of all wine tourists in the region. For this reason it is suggested that this survey could be used as a template, or basis, for future research in the region, either with the use of researchers or adjusted as a self-complete survey which could be handed out by winery staff.



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## Appendix 1

<p><b>Can I confirm that you understand the nature of this project and on that basis agree to participate?</b> <span style="float: right;">Yes [ <input type="checkbox"/> ]</span></p>
--

1. Is this the first time you have been to Central Otago? Yes [  ] No [  ]

*If no:* how many times have you visited the region? \_\_\_\_\_

2. Where do you usually live?

New Zealand Specify:	1
Overseas. Specify:	2

3. What is the *main* purpose of this trip to Central Otago? (please select one only)

Holiday/holiday activities	1	Business/conference/meetings	4
Recreation (sport/hobby)	2	Just passing through	5
Visiting friends and relatives	3	Other <i>specify</i> :	6

4. Thinking about the planning for this trip, when was the decision made to visit Central Otago? (please select one only)

Spur of the moment/when passing	1	While travelling in another country	3
While travelling in another part of NZ	2	While at home	4

5. Which towns or destinations in Central Otago have you visited or will you visit during this trip?

Destination	Destination	Destinations	Destination

6. What would you say are the Central Otago Region's main characteristics or features?

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**7. I'm going to read out a number of statements that other people have made about Central Otago. Can you tell me the extent to which you agree or disagree with each, on a scale of 1 to 7 where 1 is strongly agree and 7 is strongly disagree [SHOWCARD 1].**

	Strongly Agree			Neither		Strongly disagree		Don't Know
Central Otago is too expensive for the experiences and services provided	1	2	3	4	5	6	7	0
The wines of Central Otago are world class	1	2	3	4	5	6	7	0
The region offers a wide range of satisfying culinary experiences	1	2	3	4	5	6	7	0
The region offers a wide range of cultural heritage experiences	1	2	3	4	5	6	7	0
Service staff and sales personnel take care of their customers here	1	2	3	4	5	6	7	0
The produce of Central Otago is of a very high quality	1	2	3	4	5	6	7	0
This wine region is not too different from any other wine region	1	2	3	4	5	6	7	0
The region is difficult to get around	1	2	3	4	5	6	7	0
Wine tourism is an important part of the attraction of Central Otago	1	2	3	4	5	6	7	0
Central Otago has an interesting history	1	2	3	4	5	6	7	0
Central Otago is an unsophisticated destination	1	2	3	4	5	6	7	0

**8. Which of the following activities have you participated in, or do you intend to participate in, while in Central Otago on this trip?**

Did an adventure activity (e.g. bungy, skydiving, rafting)	1	Took a scenic tour or cruise	8
Went for a bushwalk	2	Visited an art gallery or craft studio	9
Shopped for gifts or souvenirs	3	Learned about the Māori history and culture of the region	10
Attended a Māori cultural show	4	Visited a bar or pub	11
Cycled on a cycle path or trail	5	Visited a botanic garden or park	12
Visited a museum, historic building or historic site	6	Had a meal at a restaurant	13
Learned about the European history and culture of the region	7	Visited a winery or vineyard	14

**9a. How many wineries have you visited on this trip to Central Otago so far? \_\_\_\_**

**9b. Can you tell me the names of these wineries? [up to five, list in 1<sup>st</sup> column]**

**9c. Looking at this list [SHOWCARD 2], which of the following activities did you do at xx [the first, the second etc ] winery? [continue asking for up to five wineries]**

*I did a wine tasting (1); I took a tour of the winery or vineyard (2); I had a meal (3); I bought wine with my meal (4); I bought wine to take away with me (5); I signed up to receive updates, emails or a newsletter from winery (6)*

9d. How long did you spend at xx [the first, the second etc] winery? (in minutes)

9e. In total how much would you have spent at xx [the first, the second etc] winery [per person]?

b. Winery	Wine tasting	Tour winery	Meal	Meal wine	Bought wine	Loyalty prog	9d. Time	9e. \$ Spent
1.	1	2	3	4	5	6		
2.	1	2	3	4	5	6		
3.	1	2	3	4	5	6		
4.	1	2	3	4	5	6		
5.	1	2	3	4	5	6		

9f. What other Central Otago wineries do you plan to visit, or have you visited, on this trip?

10. If didn't buy wine at any winery: Why didn't you buy any wines at the wineries you visited?

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11. Which of the following best describes how you made the decision to visit [this winery/the last winery] you visited? [SHOWCARD 3]

Researched and/or booked activities before leaving home <i>so: how long ago?</i>	<i>If</i> 1	Spur of the moment/driving past	4
Researched and/or booked activities while travelling elsewhere in NZ. <i>If so: how long ago?</i>	2	A combination of these [ <i>not on showcard, but give option if can't decide</i> ]	5
Researched and/or booked activities after I arrived in Central Otago	3		

12. Thinking just about your visits to wineries, what sources of information did you use to plan those visits? *If more than one: What has been your main source of information?*

	Main
1. _____	[ ]
2. _____	[ ]
3. _____	[ ]

13. What have you enjoyed most about the wineries you have visited in Central Otago?

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14. How could your experience of Central Otago wineries be improved? [*probe: e.g. information sources, cost of freighting wine*]

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**15. Using this [SHOWCARD 4] How important are the following factors to you when visiting wineries?**

	Extremely important			Neither			Not at all important		Don't Know
Driving to the winery takes no more than an hour	1	2	3	4	5	6	7	0	
Availability of an organised tour to the winery/vineyard	1	2	3	4	5	6	7	0	
Opportunity to taste a range of wines	1	2	3	4	5	6	7	0	
Wine tasting free of charge	1	2	3	4	5	6	7	0	
Being able to take a guided tour around the winery and vineyard	1	2	3	4	5	6	7	0	
Opportunities to relax and unwind	1	2	3	4	5	6	7	0	
Hearing stories about wine growing and wine making	1	2	3	4	5	6	7	0	
Being able to meet and talk to the winemaker	1	2	3	4	5	6	7	0	
Children are welcomed, and activities are available for them	1	2	3	4	5	6	7	0	
Opportunities to socialise with friends & family	1	2	3	4	5	6	7	0	
Wines are available to buy to take away	1	2	3	4	5	6	7	0	
Attractive scenery at the winery	1	2	3	4	5	6	7	0	
Opportunities to learn about wine and winemaking	1	2	3	4	5	6	7	0	
Opportunities to try wine & food matching	1	2	3	4	5	6	7	0	
Availability of a restaurant	1	2	3	4	5	6	7	0	

**16. I'd like you to think about what you will spend during your visit to Central Otago, including what you have spent already and an estimate of additional expenditure. Looking at [SHOWCARD 4] can you please estimate how much you will have spent, in NZ\$, in each of the following categories [if in a group, try to work out a per person amount]:**

	\$		\$
Tour(s)		Transportation (excluding tours)	
Restaurant meals (incl. wine)		Accommodation	
Bottles of wine to take away		Shopping (souvenirs, gifts etc)	
Other food, refreshments		Other	

**17. Imagine there was a half day VIP wine experience available that involved a private visit to a winery with a tour of the vineyard and winery operations with the winemaker themselves. The experience would include an opportunity to match food and wine, and a barrel tasting of premium wines. If this experience was priced at \$400 per person, how interested would you be in this experience, from...?**

Extremely Interested 1      2      3      4      5      6      7 Not at all interested

Finally, we have some questions to help us analyse our results

**18. How often do you consume wine?**

Daily	1	Once a week	4	Less than once a month	7
Most days a week	2	Once a fortnight	5	Never	8
Several days a week	3	Once a month	6		

**19. What type of wine is your favourite?**

Red wine	1	White wine	2	Rose	3	Sparkling	4	No favourite	5
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**20. If you have a favourite wine style/variety (e.g. Sauvignon Blanc, Pinot Noir), what is it?**

\_\_\_\_\_ I have no favourite wine style

**21. To what extent do you agree or disagree with each of the following statements [SHOWCARD 6]?**

	Strongly Agree			Neither			Strongly disagree	
I am knowledgeable about wine	1	2	3	4	5	6	7	
People come to me for advice about wine	1	2	3	4	5	6	7	
I have invested a great deal in my interest in wine	1	2	3	4	5	6	7	
I wish to learn more about wine	1	2	3	4	5	6	7	
My interest in wine says a lot about the type of person I am	1	2	3	4	5	6	7	
	Strongly Agree			Neither			Strongly disagree	
My interest in wine is very rewarding	1	2	3	4	5	6	7	
I am a member of a wine club or wine-related organisation	1	2	3	4	5	6	7	
I find drinking wine a particularly pleasurable experience	1	2	3	4	5	6	7	
Choosing which wine to buy is an important decision for me	1	2	3	4	5	6	7	
I make an effort to visit wineries when I am travelling	1	2	3	4	5	6	7	
I have a strong interest in wine	1	2	3	4	5	6	7	
Many of my friends share my interest in wine	1	2	3	4	5	6	7	

**22. Who are you travelling with on this trip? (one only)**

Travelling alone	1	Family	4	Other, Specify:	7
Partner/spouse	2	Family & friends	5		
Friends	3	Special interest group	6		

**23a. Are you staying overnight in Central Otago? Yes [ ] No [ ]**

If Yes: How many nights are you staying in Central Otago on this trip? \_\_\_\_\_

If Yes: What is the main type of accommodation you will use in Central Otago? (one only)

Hotel	1	Bed & breakfast / Farmstay	5
Motel	2	Motor camp/ Camp ground	6
Hostel/ backpackers	3	Private home/staying with friends/family	7
Rented holiday home	4	Other	8

*If Yes: Where is the main accommodation located?* \_\_\_\_\_

*If No: What town did you stay at last night?* \_\_\_\_\_

**24. What is the highest level of education you have achieved? [SHOWCARD 7]**

No formal qual.	1	Trade qualification	3	Higher degree	5
High school qual.	2	Degree	4	Other tertiary, Specify:	6

**25. Which age group do you belong to? [SHOWCARD 8]**

18-24	1	35-44	3	55-64	5	75 & over	7
25-34	2	45 - 54	4	65-74	6		

**26. Gender**

<i>Male</i>	1	<i>Female</i>		2
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