

**Between the vines: a comparative
analysis
of wineries' attitudes towards wine
tourism
in New Zealand**

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Abstract

This study aims to provide a comprehensive overview of wineries' attitudes towards wine tourism in New Zealand from the supply-side perspective. It is based on a survey of New Zealand national wineries' conducted in 2010, and follows up to two previous New Zealand National Wineries' surveys conducted by Hall and Johnson (1997) and Christensen et al. (2004). This research benchmarks changes which have taken place in the New Zealand wine industry with respect to wine tourism since 2003, as well as examining new elements of the contemporary wine tourism environment with respect to winery attitudes towards innovation, the environment, biosecurity and sustainability.

The incorporation of questions from previous New Zealand National Wineries' Surveys allows for longitudinal information to be presented between the 2010, 2003 and 1997 surveys. This comparative analysis of the survey time series provides value to the existing New Zealand wine tourism research by illustrating how wineries in New Zealand have used tourism as part of their business strategy. The findings reveal that there are many significant gaps in what is known about the character of the New Zealand wine tourist, and also of the industry itself. Biosecurity and sustainability issues are examined, and for the first time in wine tourism research anywhere in the world a section dedicated to innovation within the context of wine tourism is also included.

Though the nature of wine tourism in New Zealand appears to fluctuate, the generally positive attitude of the wine industry towards tourism indicated in this study suggests that there is still unrealised potential within the industry, provided that it is both safeguarded against external threats, and is also promoted correctly through the appropriate channels in order to assure future growth.

Keywords: Wine, tourism, New Zealand, innovation, biosecurity, sustainability.

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Hall, C.M., James, M. and Baird, T. (2011) ‘Forests and trees as charismatic mega-flora: Implications for heritage tourism and conservation’, *Journal of Heritage Tourism*, 6(4): 309-323.

As a result of the 2010-11 earthquakes a copy of the 1997 National Wine Tourism Survey was not able to be included in the appendices.

Chapter 1

Introduction

This thesis aims to provide a comprehensive overview of wineries' attitudes towards wine tourism in New Zealand. Wine tourism is defined as "visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors" (Hall 1996: 1) and in order to establish the current situation of wine tourism within the New Zealand wine industry it is particularly pertinent to revisit the New Zealand National Wineries' Survey. Two iterations of this survey have previously been conducted by Hall and Johnson (1998) and Christensen et al. (2004), therefore it is timely to update this research via a revised edition of the survey which was conducted during 2010.

This edition of the survey occurs at a time when the New Zealand wine industry has been enjoying a climate of what appears to be unprecedented growth (New Zealand Wine 2009a). The reality beneath the surface, however, is that the New Zealand wine industry is also fraught with problems concerning fluctuating profit levels (Cholette et al. 2005) and production (New Zealand Wine 2012; New Zealand Winegrowers 2012). A New Zealand Vintage 2009 benchmarking survey conducted by Deloitte (2010: 5) even ventured so far as to suggest that "Without a doubt, 2009 has been a turbulent year for the New Zealand wine industry, with the impacts of oversupply, together with the largest economic downturn in 20 years, affecting all involved in the industry." It is therefore with a degree of caution that this study approaches the idea put forward by Hughey et al. (2005) that a boom period has occurred in the New Zealand wine industry with an industry with \$NZ 100 million worth of annual exports in 1999 growing into one that is now worth almost \$NZ1 billion in export dollars per annum over the following decade (New Zealand Wine 2009a). This growth is a double-edged sword however, as

Euromonitor International (2012: n.p.) predict that “while wine consumption is expected to increase over the forecast period, wine over-supply conditions are also expected to persist into the forecast period until at least 2013.”

The growth in wine production has seen an explosion in the number of registered vineyards in New Zealand with 511 listed in the 2009 Australian and New Zealand Wine Directory (Winetitles 2009) compared with 270 listed wineries in 1997 (Hall & Johnson 1998) and 419 in 2003 (Christensen et al. 2004) respectively when the two previous New Zealand National Wineries’ Surveys were conducted. This same period has also seen a rise in the amount of interest in locally produced wine products available on the New Zealand market (New Zealand Wine 2009b). This may appear to be good news, but with growth comes challenges. Based on this situation, Deloitte (2010: 21) suggest the following:

It would seem that the dialogue with customers is being conducted by the exporters and distributors on behalf of the wineries, thus creating a clear distinction between the *winemakers* and the wine *sellers*. The winemaker’s dialogue with the end consumer remains a significant challenge.

When the above observation is considered in the light of Euromonitor International (2012: n.p.) report that “the wine over-supply issue continued to impact New Zealand, with cheaper domestic and imported wine flooding the country. This led to significant trading down on the part of consumers from higher quality to lower quality wine during the period”, it is clear that many New Zealand wineries need to focus on engaging customers in new and innovative ways if they are to remain solvent. As Deloitte (2010: 21) contend, “as wine is still largely a luxury good and the fact New Zealand wishes to remain a premium/luxury producer of wine then maintaining interactions with customers is considered crucial to the industry’s ongoing development” Building new and reinforcing existing relationships with consumers is where opportunities

provided by wine tourism could potentially provide add value to the New Zealand wine industry within this increasingly volatile financial climate.

It is estimated that over 475,000 wine international and domestic tourists now visit New Zealand wineries annually (Ministry of Economic Development 2009). The bulk of winery visitation is made up by domestic wine tourists, who account for 63 per cent of this figure (Ministry of Economic Development 2009), and international guests make up the remaining 37 per cent (Ministry of Economic Development 2009). Such a dramatic increase in winery visitation does not come without problems however, and this thesis focuses on the potential issues raised within the realms of biosecurity (Hall & Johnson 1997; Christensen et al. 2004; Hall 2003b, 2005b), sustainability (Christensen et al. 2004; Hall & Johnson 1997; Gabzdylova et al. 2009), cooperation (Hall et al. 2003; Thomas 2005; Alonso 2010) and networks (Hall et al. 1997). The relationship between wine tourism and industry-led innovations within the context of the New Zealand wine industry is also explored in order to see whether focusing on wine tourism is causing more or less innovation to occur within the industry (Sorenson 2001; Stamboulis & Skayannis 2003; Hall & Williams 2008; Hjalager 2009). Several of these issues, and sustainability and innovation in particular, have not previously been explored in surveys of wine tourism in New Zealand.

This third iteration of the New Zealand National Wineries' Survey allows for longitudinal information to be presented between 2010 and 2003 surveys, with (where data was available) comparisons also included to the original 1997 survey, and this is the first time such comparative information has been included in the survey series on a time series basis. This comparative analysis of the survey time series provides value to the existing New Zealand wine tourism research by illustrating how wineries in New Zealand have used tourism as part of their business strategy. This strategy not only provides an umbrella for the various revenue streams that wineries engage in (such as cellar door sales, outdoor concerts and regional wine and food

festivals), but also encompasses a growing awareness of the environmental issues such as biosecurity (Hall 2004) and sustainability (Gabzdylova et al. 2009). It is with these factors in mind that this iteration of the survey also seeks to update past research on winery characteristics, winery visitors, biosecurity, sustainability, cooperation, networks, and marketing. An entirely new section focusing on examining industry-led innovations is also introduced.

1.1 Research aim

The express aim of this thesis is to examine wineries' attitudes towards and perceptions of wine tourism in New Zealand. This research aim has led to the formulation of seven core research questions which guide this thesis. These are listed as follows:

1. Have there been significant changes in New Zealand wineries' attitudes towards wine tourism since the last National Wineries' Survey was conducted in 2003?
2. Do New Zealand wineries that engage in wine tourism actively participate in innovation?
3. Are New Zealand wineries that engage in wine tourism placing their business at risk from potential biosecurity threats?
4. Do New Zealand wineries that engage in wine tourism view environmental attributes as important for attracting increased visitation?
5. Do New Zealand wineries that engage in wine tourism offer more activities aimed at wine tourists than were available when the last National Wineries' Survey was conducted in 2003?
6. Are New Zealand wineries that engage in wine tourism attracting a more knowledgeable wine tourist since the last National Wineries' Survey was conducted in 2003?
7. What is the extent of engagement of New Zealand wineries who engage in wine tourism with other businesses?

This chapter will now turn to discuss the value and contribution and that this research makes to existing New Zealand wine tourism studies.

1.2 Importance of this research

The importance of this research centres on understanding wine tourism from the supply side of the industry. Previous New Zealand wine tourism research has already focused on tourist demographic and psychographic information (Reid, 1990; Hall & Johnson, 1997; Christensen et al. 2004; Mitchell & Hall 2006), biosecurity (Hall 2003b, 2005b; Wilkins & Hall 2001) and sustainability (Gabzdylova et al. 2009). However, biosecurity and sustainability issues have not previously been addressed in as much depth as the current thesis while sustainability has not previously been explored via an extensive survey of wineries. In addition, the thesis makes a significant empirical contribution to the literature on wine tourism and innovation not only within the New Zealand wine industry but, because of the novelty of such research, potentially at an international level. Importantly, this thesis also contributes to the longitudinal time series survey of New Zealand wine tourism (Hall & Johnson 1997; Christensen et al. 2004) and recognises the value of such an approach to enable national and international comparisons to be made (Getz 1994; Tassiopoulos et al. 2004; Burgess et al. 2005). The value of such longitudinal studies are often advocated with wine and tourism research but are rarely carried out (Jamal & Getz 1995; Decrop et al. 2004; Rindfleisch et al. 2008).

1.3. Thesis outline

This thesis is comprised of six chapters. Chapter 2 sets the scene for this study by providing an overview of international wine tourism research, while New Zealand based wine tourism

research is reviewed in Chapter 3. This particular chapter gives an overview of the historical context behind the New Zealand wine industry and how regulatory changes have paved the way for wine tourism. It also provides some perspective on the current position of wine within the New Zealand national brand. Both of these chapters are divided into sub-sections which provide the foci for this thesis; these cover winery characteristics, winery visitors, biosecurity, sustainability, innovation, cooperation, networks and marketing. The reason for this is to provide justification for the questions which are asked in the 2010 New Zealand National Wineries' Survey and to show how these questions relate to both international and New Zealand wine tourism literature.

Chapter 4 discusses the methodology used in this study, and covers survey design, data collection, procedures utilised and ethical considerations. The findings of the 2010 New Zealand National Wineries' Survey and a discussion of these results follow in Chapter 5; this chapter also contains longitudinal comparisons to the data which was available from the two previous iterations of the survey in 1997 and 2003. Chapter 6 provides a summary of this study and draws conclusions on what the current view looks like from the supply-side perspective regarding wine tourism in New Zealand as well as highlighting some potential directions for future wine tourism research.

Chapter 2

International research on wine tourism

International research on wine tourism has seen the spotlight move from a focus on traditional Old World wine trails (e.g. Charters 2009) to reflect the broad popularity of wine tourism as a product (Getz 2000; Telfer 2000a, 2000b, 2001 a, 2001b, 2003; Hall & Sharples 2008). Although this appears to be good news for the wine industry, it does not alter the fact that each wine region faces unique challenges and obstacles which must be addressed in order to maximise the benefits of wine tourism (Mitchell & Hall 2006).

This chapter will offer an examination of internationally based wine tourism research from a supply-side perspective. Both this and the following chapter on New Zealand will be divided into the same areas of wine tourism research. First, research into the characteristics that make up winery profiles and a profile of the type of visitor that is interested in wine tourism experiences. Second, the growing stream of literature that exists concerning the environmental dimensions of biosecurity and sustainability are highlighted, and the relationship between these dimensions and wine tourism is explored. Prior international research in the fields of innovation, networks and co-operation is also discussed before this chapter concludes by considering the relationship between wine tourism and marketing, and examines the literature that makes up the core of this particular area of wine tourism research.

2.1 Winery Profile

Cohen and Ben-Nun (2009: 23) state that “to market wine destinations and wine tourism products, it is essential to understand who winery visitors are by understanding their perceptions regarding the important attributes within wineries and wine regions which might include a wide range of attractions”. It is imperative to recognise that tourists are experiencing much more than

just the mere enjoyment of a glass of wine (Charters & Ali-Knight 2000, 2002; Cohen & Ben-Nun 2009; Dodd 1995; Hall & Winchester 2000; Hall et al. 2000; Richardson 2004; McCutcheon et al. 2006; Telfer & Sharpley 2008). The wine tourism experience also includes the taking in of local scenery (Page & Getz 1997; Getz 2000; Telfer 2009; Gómez & Molina 2011), and can also lead to visiting other complementary attractions within the same geographic proximity (Cohen & Ben-Nun 2009). International wine tourism research that describes the variety of characteristics that make up winery profiles primarily focuses on geographical location, winery size, and whether or not additional value based propositions such as cellar door sales and in-house tasting facilities are available onsite. Each of these aspects will now be examined in turn.

2.1.1 Winery Location

Alonso and Liu (2010) studied the developmental stage of emerging wine regions in Western Australia, and found that some winery owners were confident that wine, tourism and hospitality would blend effortlessly together; this study revealed that there was a downside to this confidence however, as reality showed that “challenges regarding a lack of cohesion and fragmentation among operators, as well as financial limitations, or the geographic isolation of some wineries/regions” (Alonso & Liu 2010: 257) served to slow down the development of wine tourism. Mitchell et al. (2012) employed “Bonnemaison’s cultural systems approach” to explore the relationship between rural cultural systems and the production and consumption of wine tourism in Champagne, France and the Margaret River wine region in Australia. This research was designed to study cultural geographical phenomena, and found that successful wine tourism ventures were closely linked not only to the land, but were also were rooted in the local mythologies that were ingrained within the cultures of both regions that were studied (Mitchell et al. 2012).

Prior studies of the relationship between the distance function of a winery from its nearest major geographical centre have been conducted (Bruwer 2003; Getz & Brown 2006) in order to ascertain whether the proximity of a gateway city to a vineyard provides a catalyst for increased visitation by wine tourists. Research in this area has also focused on the length of time in which visitors engage in wine tourism activities, and whether their journeys are purely limited to daytrips or longer stays at the winery concerned (Carmichael & Smith 2004; Deery et al. 2005). Beames (2003: 212) also points to the “need to address the provision of infrastructure in order to give tourists a broader holiday experience and extend the length of stay and the value of the holiday spend”. The lack of adequate facilities for all patrons (including those with patrons with disabilities and visual impairments) was noted as being a primary reason why tour operators in Australian wine regions chose not to include wineries as part of their tour packages (Beames 2003).

López-Guzmán et al. (2011: 375) note that wine tourism provides the opportunity for tourists to partake in the “cultural, social, economic and environmental history” of a region; recent research into Spanish wine routes underlines the fact that food and wine are the main attractions for regional winery visitation (López-Guzmán et al. 2011). This notion is also supported by Crispin and Reiser (2008) and Thompson and Prideaux (2009) who found that tourists did not visit wineries to participate in secondary activities, but were there predominately for a sensory experience (Getz 2000) which also bonded visitors closer with the winemaking traditions of the region concerned.

2.1.2 Winery Size

Barber et al. (2008) examined both on-site and off-site marketing strategies of both urban and rural wineries in the United States based on size and location and concluded that urban wineries tended to distinguish themselves by focusing on education as a wine tourism marketing strategy,

whereas rural wineries based their strategies more on escapism, where the winery becomes “a venue to escape the monotony of urban and city living” (Barber et al. 2008: 55). Frochot (2000, 2003) recognised that size was an important factor in the success of wine attractions, and found that smaller scale wineries have a greater success in attracting visitors than their large scale counterparts. This was seen in research conducted on French wineries which operated at a smaller scale, and were consequently able to provide visitors with an experience based around a greater level of intimacy and direct contact with wine producers which large wineries had found hard to replicate (Frochot 2000, 2003).

2.1.3 Ownership status

The ownership status of a winery may also be an important factor in considering the level of resources available to enable wine tourism activities (Edwards 1989; Williams & Kelly 2001; Stewart et al. 2008). Getz and Carlsen (2000) note that the different goals, values and lifestyle approaches that small, family-owned operations have when contrasted with the objectives of large corporate organisations present two counterpoints when growth and profitability are compared. Not only does ownership status obviously affect the level of turnover that an individual winery is capable of achieving, but in the case of smaller firms it can also result in what has been termed by Simpson and Bretherton (2004: 117) as “organisational complacency” which can serve to impede cluster development within wine regions. Alonso and Northcote (2010) researched small Western Australian wineries and found that wine tourism could provide smaller wineries with business opportunities provided that the businesses possessed a clear vision of for the direction of their business. If winery operators lack vision, then Mancino and Presti (2012) suggest that tailored educational programmes which focus on the potential opportunities offered by wine tourism could be beneficial to guide business strategies. Thomas (2005: 17), also referring to SMEs within wine tourism, states that “though individually such businesses employ few people, collectively the employment generated by businesses reliant on

visitor spend can be highly significant” and this crucial if the cycle of money introduced into a regional economy is to stay local.

2.1.4 Cellar door sales

Wine tourism is regarded as a vital source of added value for vineyards (Alant & Bruwer 2004; Loubser 2004), and the importance of the cellar door experience as a component of this is recognised by Charters and O’Neill (2001: 14) who state that “it is important to stress that the key areas of winery performance in this relationship [with winery visitors] are responsiveness and contact – which relate directly to the customer’s relationship with staff at the cellar door”. Batra (2008: 275) also acknowledges the importance of this relationship:

Wine tourism is seen as a brand differentiator. It enables wineries to meet their consumers face-to-face and gives them an opportunity to raise the profile of their products in a customer’s mind. Customers may then develop a long-term connection with a product that they have sampled at its place of origin.

It has been suggested that there are three major benefits which are derived from cellar door sales, that of “distribution at low marginal cost, the development of brand equity, and the chance to add value” (Charters & O’Neill 2001: 7). Barber et al. (2008) noted that for small wineries tasting room facilities form an important part in the overall tourism marketing strategy by drawing consumers’ attention towards the products available, which is then used to translate this attention into direct sales of the product, making cellar door sales extremely lucrative. Research into Spanish wineries by Alonso and O’Neill (2009) found that the use of cellar door sales as part of a long-term strategy to convert visitors by generating interest in wine brands was a commonly used marketing method which often resulted in brand loyal behaviours being exhibited by recent winery visitors.

There have been some fundamental problems with surveys which only focus on wine tourists purely at the cellar door however (Alebaki & Lakovidou 2011; Cohen & Ben-Nun 2009). Cohen and Ben-Nun (2009) note that surveys taken at the cellar door miss out on examining the perceptions and behaviours of non-visitors; they suggest that “this part of the population might include, for example, a young generation of who do not necessarily visit wineries or cellar doors, but might become the next generation of wine tourists” (Cohen & Ben-Nun, 2009: 23). Getz and Brown (2006) have suggested that cellar door surveys are important for evaluating the experience that visitors have and determine improvements which need to be made in terms of service levels.

2.1.5 Tasting room facilities

Tasting rooms also play a key role in creating what Olsen and Thach (2005) refer to as the emotional attachment between visitors and the wine brand itself. Maintaining this attachment has been noted as a challenge for wineries by Jolley (2002) who found that only one-third of visitors engaged in brand loyal post-visit purchase behaviour. The charging of tasting room fees where wineries charge either a set fee for tasting or a percentage fee based on the amount of wine consumed has been the subject of contention amongst researchers (Dodd 1995; King and Morris 1997b; Travers 1999; O’Neill, Palmer, & Charters 2002; Alonso et al. 2008; Vlachvei and Notta 2009; Thomas et al. 2010; Bruwer et al. 2012).

Bruwer et al. (2012: 57) write that their research into Canadian wine tourists who chose to use tasting room facilities “established that the high usage (and probably high involvement) by a wine consumer can be directly reached at the winery tasting room retail channel. This provides the ideal opportunity for direct marketing to them and establishing a long-term relationship with the brand”. Nowak et al. (2006) state that the positive emotions which visitors experience in tasting room facilities are crucial in building brand loyalty, while Madonna (1999) points out the

value that a quality tasting room experience can have in encouraging repeat visitation to the winery concerned. Maintaining this long-term relationship post-visit is an area which Bruwer et al. (2012: 57) suggests needs further research:

It needs to be established to what extent a winery tasting room visit acts as a multiplier of the winery's future wine sales to the same consumers (and those directly influenced by them) in the retail trade and exactly which wine tourism activity factors the strength of this multiplier effect are contingent upon.

In their research into wine routes in Greece Vlachvei and Notta (2009) found that meeting the winemaker, learning about the how the wine was produced, and being able to taste and then purchase the wine onsite was a prime source of motivation for winery visitation. Other significant benefits noticed in this study for producers were “improved reputation, promotion and publicity and increased sales” (Vlachvei & Notta 2009: 106) through allowing visitors onsite. The development of wine tasting rooms has played a key role in allowing people to learn and gain an appreciation for the wine industry (Macionis 1994, 1996; Dodd 1995; Ali-Knight & Charters 1998, 1999, 2001; Ali-Knight & Pitt 2001). The opportunity to sample wine first hand serves to overcome the reluctance which consumers may have toward purchasing unknown brands in a retail situation (Dodd 1995; Hall & Mitchell 2008).

2.2 Products

Offering a range of wine-related or regionally associated products onsite can help provide wineries with a valuable stream of revenue aside from concentrating solely on selling bottles of wine to visitors (Barber et al. 2008; Dodd 1995; Dodd & Bigotte 1997; Dodd & Gustafson 1997; Telfer & Hashimoto 2000; Jarvis 2002a, 2002b; Jarvis & Hoffman 2002). The types of products available from the cellar door typically include company branded merchandise and regional merchandise (Hall & Mitchell 2008). Company promotional material and regional promotional material available in the form of brochures can also further serve to reinforce the attributes of a

particular region in the mind of the wine tourist whilst the take- home merchandise reinforces the memory of the experience post-visit (Barber et al. 2008).

2.3 Services

Service quality is a vital component to the overall experience of the wine tourist, and is used by wineries to differentiate their product offering from those of their competitors (Dodd & Gustafson 1997; Getz et al. 1999; O'Neill & Charters 1999, 2000; Charters & O'Neill 2000, 2001; Fraser & Alonso 2003; Fuller 2002; O'Neill & Palmer 2004; Telfer 2001a; Pan et al. 2008). The importance of understanding how service quality can be used as a point of difference has been noted by Charters and O'Neill (2001: 7) who contend that "service quality and its importance to cellar door sales is essential. For the winery owner an effective cellar door offers three benefits: distribution at a low marginal cost, the development of brand equity, and a chance to add value". Services offered commonly range from winery tours which incorporate wine tasting at the cellar door (Kendziorek 1994a, 1994b, 1994c, 1994d; Charters & O'Neill 2000, 2001; Dodd & Beverland 2001; Lockshin & Knott 2009; O'Neill & Charters 1999, 2000; Pan et al. 2008), the sampling of local cuisine at onsite restaurants, and also the hosting of functions and conferences. The addition of accommodation for guests has become an important draw card (Getz 2000) for those who may have overindulged in sampling the variety of products on offer. Festivals and events have also gathered momentum as vehicles designed to attract wine tourists (Houghton 2001, 2002; Yuan et al. 2005) and as wine tourism grows, entertainment has become an important cross-promotional tool for the marketing of regional wine and food endeavours.

Regional comparisons on service quality have been conducted in Australia where Charters and O'Neill (2001) studied wineries in the Margaret River and Barossa Valley wine regions. This research recognised that while there were differences between the intentions of wine tourists in each region, both sets of customers studied were also driven by the "expectations of what the

wine tourism experience will offer them, and [this] has a relationship to their overall satisfaction with the winery, to the extent that this is measured by purchase expectation and a willingness to revisit” (Charters & O’Neill 2001: 14).

2.3.1 Facilities

The range of facilities available onsite is another important element which wineries use to attract tourists. Examples include wine caves, barrel halls, and historical displays which are all important contributors to the education which visitors receive onsite. These can also be coupled with live winemaking demonstrations which give visitors the chance to meet the winemaker in intimate surroundings and gain first-hand knowledge on the techniques used to produce wines which can then be purchased directly at the cellar door (Dodd 1995, 1999, 2000; King & Morris 1997b; Hills 1998; Travers 1999; O’Neill, Palmer, & Charters 2002; Alonso et al. 2008; Vlachvei & Notta 2009; Bruwer et al. 2012). The scenery and surroundings which a winery inhabits – what is sometimes referred to as the “winescape” (Peters 1997, as cited in Hall et al. 2000) or even the wine tourism “terroir” (Hall & Mitchell 2002a: 69) – is a crucial ingredient adds to the overall experience and is also a significant factor in motivating winery visitation (Getz 2000; Lang Research 2001; Brown & Getz 2005; Schiefer & Fischer 2008; Brown & Smith 2010).

2.3.2 Services for the disabled

The growth of wine tourism has also presented the challenge to wineries to ensure that their facilities are accessible to all patrons, and in many legal jurisdictions facilities must take into account those patrons who may suffer from disabilities. The lack of adequate facilities for all patrons (including those with patrons with disabilities and visual impairments) was noted as being a primary reason why tour operators in Australian wine regions chose not to include wineries as part of their tour packages (Beames 2003). In response to such a situation wineries have been noted

as offering improved wheelchair access and also services for those with visual and hearing impairments such as improved signage and hearing devices. Without undertaking such measures, vineyards run the risk of losing potential customers to their competitors who offer facilities which are easily accessed by the disabled (Beames 2003).

2.4. Visitor profile

Attempting to gain an understanding of the wine tourism experience from the visitor's perspective is an area of research where a wealth of international studies exist (Tourism South Australia 1991; Augusta-Margaret River Tourism Association 1994; Morris & King 1997b; Carlsen & Dowling 1998; Carlsen 1999; Patterson 2000; SATC 2001; Carlsen & Ali-Knight 2004; Carlsen & Charters 2004; Treloar et al. 2004; Alonso et al. 2007a, 2007b, 2007c; Barber et al. 2010; Getz & Carlsen 2008; McCutcheon et al. 2009; Barber et al. 2010). Analyses of visitor behaviour examine demographic characteristics, group behaviours, the motivations behind winery visitation, and whether a particular set of attributes that define the typical wine tourist actually exists.

2.4.1 Demographic characteristics

Overseas trends in demographic research on wine tourism has witnessed the debate emerge over exactly who represents the typical wine tourist; Folwell and Grassel (1995) believe in their study of Washington State wineries that wine tourists were middle aged with above average income, while Williams and Dossa (2003) argue in their study of wine tourists in British Columbia that the typical wine tourist was younger, a non-resident, better educated but with below average income. Demographic characteristics such as age and gender (Dowling 1998, 2001; Dowling & Carlsen 1999; Foo 1999; O'Neill & Charters 2000; Augustine 2001; South Australian Tourist Commission [SATC] 2001; Victorian Wine Tourism Council 2001; Bruwer 2002a; Treloar 2002a, 2002b; Carmichael 2005; Alonso et al. 2007a, 2007b, 2007c; McCutcheon et al. 2009;

Getz & Carlsen 2008; Barber et al. 2010) have also provided wine marketers with insights into generational differences that occur in wine-related travel, which has resulted recently in Australian vineyards attempting to expand their market beyond that of the traditionally older wine consumer by appealing to Generation X and Y (Bruwer 2002a, 2002b; Treloar et al. 2004; Carlsen et al. 2006; Getz & Carlsen 2008).

Categorisation by lifestyle topology has also filtered into international research on the consumer behaviour of wine tourists with Corigliano (1996) also devising a typology in the light of the work of Hall (1996) which suggested that wine tourists existed across four categories: “The Professional” who is both knowledgeable and wanting to sample new varieties of wine; The Impassioned Neophyte” who is attracted by both wine and food, the scenery and the social aspects of the experience; “The Hanger-On” who has a low level of wine knowledge, yet is eager to be educated in this area; and finally, “The Drinker” who usually visits as part of group and is drawn by exclusive brands (Corigliano 1996). The tripartite typology devised by Hall (1996) has been utilised by Houghton (2008), and was also applied by Charters and Ali-Knight (2002) in an attempt to gauge consumer behaviour based around interest in wine, which led to the recognition of a further segment of highly knowledgeable wine drinkers termed as the “Connoisseur” (Charters & Ali-Knight 2002).

Wine knowledge which visitors possess is one of the signifiers that has been widely used in attempts to pinpoint the lifestyle demographics of wine tourists (Maddern & Golledge 1996; Macionis 1997; Morris & King 1997b; Howley and van Westering 2000; Scudamore-Smith and Rutledge 2001; Charters & Ali-Knight 2002; Department of Tourism Industry Resources 2005; Sheridan et al. 2009). Charters and Ali-Knight (2002) put forward the idea that wine knowledge may not correlate with an individual’s interest in wine; this notion is dismissed by Mitchell and Hall (2006) who point out that the recognition by Charters and Ali-Knight (2002) of the

existence of a “Connoisseur” segment contradicts this statement, and proves that there is a relationship between wine interest and wine knowledge.

Lifestyle characteristics provided the foundation for the Economic Planning Group (EPGC) who devised the Travel Activities and Motivation Survey (EPGC 2001). This typology was based on research on Canadian and American travellers, and suggested that based that experiences sought by visitors revolved around the level of interest that they already possessed in the activity that they were participating in; those who had high levels of interest were viewed by the EPGC (2001) as being part of a segment which was termed “Personal Indulgence”, those who were curious were in search of “Exploration” experiences, while the remaining segment of visitors were motivated by “Romance and Relaxation” (EPGC 2001). Cambourne and Macionis (2000) put forward the notion that visitors who had similar values and lifestyle characteristics were more likely to seek experiences that matched the perception of their social status, and devised the what were termed “Value Segments” (Cambourne & Macionis 2000) where wealthy “Visible Achievers” and the well-educated “Socially Aware” were more likely to want to flaunt their status by seeking indulgent experiences (Cambourne & Macionis 2000).

Carlsen (2004) takes this market segmentation argument one step further by contending that target marketing within wine tourism requires greater development and needs to recognise that a majority of consumers visit wineries based on their location to complementary attractions within a particular region (Carlsen 2004). This dictates that in order to maximise visitor numbers, strategies need to be clearly mapped out which engage visitors on multiple levels. This can be through either education which focuses on the region and wines produced (Barber et al. 2008), knowledge of visitor lifestyles and demographics (Mitchell & Hall 2001b; Charters & Ali-Knight 2002; Cullen et al. 2006; Houghton 2008), or even through testing new products at the cellar door (Dodd 1999, 2000; Hall et al. 2000).

The additional revenue which wine tourism provides wineries has been the subject of discussion in terms of economic impacts this presents (Australian Winemakers Federation 1996; Milroy 1997; Macionis 1998; Macionis & Cambourne 2000; Skinner 2000; Winemakers Federation of Australia 2002; Tourism Victoria 2003a; Taylor & Shanka 2004; Mitchell & Hall 2006; Storchmann 2008). The effects of tourist spending have been noted in California where in 1998 over US\$300 million was spent in restaurant and hotels (Skinner 2000, as cited in Mitchell & Hall 2006) which had increased to over US\$2 billion dollars by 2001 in the Napa Valley and Sonoma wine regions of California alone (Taylor et al. 2004, as cited in Mitchell and Hall 2006). Storchmann (2008) noted that in the Walla Walla wine region of the United States alone that slightly less than 17 per cent of all restaurant revenue and approximately 40 per cent of all hotel revenue is tied to the wine industry.

2.4.2 Wine Tourism Groups

Griffith (2007) observed in a study of the Walla Walla Valley wine region in the United States that negative effects could occur from an influx of wine tourists; these ranged from a shift in culture (Getz 2000) to a feeling of social exclusion (Roberts & Hall 2001) on the part of local residents as visitors exhibit an increasing degree of affluence than the existing local population (Hall et al. 2000). Mitchell and Hall (2006: 317) note that “the vast majority of visitor numbers come from New World wine countries...however, estimates of visitor numbers are much less readily available for Old World wine regions”. Frochot (2000, 2001) studied smaller regional wineries in Burgundy, France, and noticed that just over a third of these winemakers received less than 1000 visitors per year, while large operations could attract upwards to 130,000 visitors a year (Frochot 2000, as cited in Mitchell & Hall 2006). By comparison, Cambourne et al. (2000) cite Italian figures which place wine tourism visitors to Italian wineries in the region of 2.5 million people. Mitchell and Hall (2006) have argued for the need for consistency in terms of visitor estimations at a winery, regional and national level. This presents an important area of

further research in order to provide for improved levels of accuracy and precision in quantification of visitor numbers (Golledge & Maddern 1994; Mitchell & Hall 2006).

2.4.3 Reasons for visitation

Examination of the motivations behind winery visitation has suffered from inconsistencies in terms of the measures used. Mitchell and Hall (2006: 321) remark that this has made “direct comparisons between studies difficult and generalisations almost impossible”. Measures which have been applied in past research include the total number of visits to wineries within a particular wine region (Dodd 1995; Dodd & Bigotte 1995, 1997), the number of visits to wineries which exist within the same state (Patterson 2000), the total number of visits to a wine region (Morris & King 1997b), the number of visits over a twelve month period to a winery (Dodd 1995; Dodd & Bigotte 1995, 1997; Patterson 2000), the length of time between winery visits (Maddern & Golledge 1996; Cullen et al. 2006) and whether visitors are embarking on a visit to a winery for the first time (Hashimoto & Telfer 2003). Maddern and Golledge (1996) also attempted to examine patterns of seasonality amongst wine tourists and found that there were no distinct discernible patterns that could be extrapolated from the data available.

Escapism has been found to be a significant motivating factor in winery visitation, with Hall and Johnson (1997) citing the tranquillity offered by rural settings as being critical to a positive wine tourism experience; Getz (2000) supports this assertion by declaring that both idyllic views and a picturesque landscape are important in creating the concept of what Page and Getz (1997) and Marzo-Navarro and Pedraja-Iglesias (2009) term “country experience”. Ravenscroft and Van Westering (2001) discovered that the educational elements of the winery experience such as classes on winemaking, wine tasting and being able to converse directly with wine makers about the attributes of the wines available were also an important reason for visitation. This finding was also supported by research conducted into winery visitation in Israel by Cohen and Ben-Nun

(2009) which illustrated that the willingness of tourists to experience the features of a region was a motivating factor.

2.4.4 Visitor attributes

Ascertaining whether there is a common set of attributes which define the typical wine tourist has been the subject of on-going analysis amongst researchers (Tourism South Australia 1991; Dodd & Bigotte 1995, 1997; Morris & King 1997b; O'Neill & Charters 2000; Lockshin & Spawton 2001; Atkin et al. 2007; Jayawardena 2008; Bruwer & Alant 2009; Quadri-Felitti & Fiore 2012; South Australian Tourist Commission [SATC] 2001; Scherrer et al. 2009; Alonso et al. 2006). The supply-side perspective has revealed that visitors are motivated by a variety of reasons to engage in wine tourism (Macionis 1997) which makes pinpointing a defined set of attributes difficult. The influence and the inclusion of family, friends and partners in groups who participate in winery visitation is recognised as being important (Rutzou 1997; Jago & Issaverdis 2001; Jayawardena et al. 2008; Maddern & Golledge 1996; Patterson 2000; Nowak et al. 2006; Pikkemaat 2009). Dodd (1995) surveyed the amount of time spent once onsite and the purchase behaviour of wine tourists, but for the most part behavioural studies have been difficult to implement due to inconsistency in the nature of the measures applied (Mitchell & Hall 2006).

Galloway et al. (2008) conducted research on the sensation seeking behaviours of wine tourists, and reported that there was a propensity “for higher sensation seekers to be attracted to travelling off the beaten track” which is important for effectively positioning tourism attractions such as wine trails; this could be combined with other activities in a region which appeal to higher sensation seekers and “their interest in self-indulgence” (Galloway et al. 2008: 963) in order to create cohesive and attractive adventure tourism packages. Marzo-Navarro and Pedraja-Iglesias (2009, 2010) found that leisure activities on offer coupled with the level of service available were important factors which motivated visitation from the perspective of winery visitors in

Spain. The educational aspects of learning about the wines that were produced onsite directly from the winemaker also positively affected the intentions of potential wine tourists (Marzo-Navarro & Pedraja-Iglesias 2009, 2010).

Barber et al. (2008: 47) point out that, in the case of small wineries, “a well-stocked gift store can enhance the consumer’s wine visitation experience by promoting a sense of memory of the trip”. Souvenirs purchased during a winery visit have been noted as integral to the overall wine tourism experience as they also reinforce brand association (Dodd 1995; Richards 1996; Dodd & Bigotte 1997; Roberts & Sparks 2006; Hashimoto & Telfer 2007; Hall & Mitchell 2008). Dodd and Bigotte (1997) also found that 20 per cent of the overall tourist spend at wineries was on souvenirs and non-wine related products, making this a lucrative stream of revenue. Sparks (2008) examined how wineries in Australia could attract potential wine tourists and increase revenue by appealing to a set of common behaviours which she believed were exhibited by wine tourists; this particular study revealed that there were “three unique dimensions of wine tourism were found to exist, namely destination experience, core wine experience and personal development” (Sparks 2008: 1188). Donaldson (2004) also noted, in research conducted on Australian wineries, that domestic visitors tended to spend longer at one destination than those who did not engage in wine tourism, with over five nights spent on average in one location; it was also revealed that the same group of travellers contributed more than 76 per cent (Donaldson 2004, cited in Mitchell & Hall 2006: 321) to the local economy than other domestic travellers through dining out and sightseeing activities.

Subsequent consumer behaviour exhibited post visit has been noted as having an impact on the way in which wine is distributed, the development of brand imaging and the level of customer satisfaction with the wine product itself (Sambridge-Mitchell 1999; Charters & Al-Knight 2000; Hall et al. 2000; King 2000; Mitchell et al. 2000; Mitchell & Hall 2006; Morris & King 1997a; O’Neill & Charters 2000). Although research into post visit behaviour has been noted by

Mitchell and Hall (2006) as being substantially under researched, King and Morris (1997a) have attempted to track basic purchase behaviour post visit of wine tourists in the Augusta/Margaret River region of Western Australia, while Houghton (2001, 2002, 2008) focussed on repeat visitors to wine festivals and the effect that these events had on the purchase behaviour of festival attendees. Houghton (2001, 2002, 2008) found that subsequent purchase behaviour revealed a positive increase in the amount of wine purchased by festival attendees post visit when compared with participants' purchase behaviour prior to attending a festival.

2.5 Environmental Issues

2.5.1 Biosecurity

Biosecurity is defined by Mitchell and Hall (2006: 325) as “the protection of a country, region, location’s or firm’s economic, environmental, and/or human health from harmful organisms” which provides a context for the focus of this section in examining the relationship between wine tourism and the biosecurity threats posed by winery visitation. While the environment plays an important part in wine’s image, it is surprising to note that there is relatively little research in existence that directly looks at the wine tourism and environment relationship. Hall (2011: n.p.) highlights this when he states that “despite recognition of tourism as a major contributor to biological invasion there is a dearth of studies on tourism’s role in international institutional arrangements that surround biosecurity and the management of alien species”.

Wynberg (2002) notes that due to the many conflicting strategies available to manage biological invasions that there is a distinct need for the development of a universal set of legislative guidelines designed to frame appropriate biodiversity conservation techniques. Formative approaches towards such guidelines exist within the framework of the Convention on Biological Diversity (CBD) (1992) and strategies put forward by the Council of Europe (2003). Attempts to prevent the transmission of vector-borne diseases which arguably present the highest level of threat to wine tourism have been hampered by governmental and global management failures (Harrus & Baneth 2005). This in itself suggests that greater collaboration between government agencies and research institutions could serve to provide a co-ordinated global legislative approach (Harrus & Baneth 2005).

Key themes that have emerged within the area of wine tourism in relation to biosecurity and invasives concern the level of awareness of potential biosecurity risks, what strategies are in place to deal with any such occurrences, and where wineries are able to turn in order to gain the

information that they need to deal with and contain any problems that could potentially arise as a result of a breach of biosecurity protocols. It has been noted that there is a limited awareness of biosecurity risks at the level of the wine tourist who is coming into the country from a foreign destination (Hall 2003b), while an awareness of the same risks have been recognised as being important by stakeholders within the wine industry in the Okanagan Valley of British Columbia (Wilkins & Hall 2001).

2.5.1.1 Awareness of biosecurity risks

In terms of risk mitigation, it has become of paramount importance to question whether vineyards have effective strategies in place to deal with potential biosecurity threats. International recognition of the importance of strict biosecurity protocols and the importance of a high degree of information sharing regarding potential biosecurity risks within wine production has been noted by Poitras and Getz (2006) in their study of wine tourism in Oliver, British Columbia which found that from the perspective of stakeholders at the community level wine tourism was viewed as an important source of economic prosperity. Protection of the natural environment from biosecurity risks that could be introduced by visitor traffic onsite is therefore paramount from the stakeholder perspective in terms of defining any long term strategies towards the promotion of sustainability initiatives (Poitras & Getz 2006).

2.6 Sustainability

The concept of sustainability within the context of viticulture and oenology, what are jointly described here as winegrowing, has been defined as “growing and winemaking practices that are sensitive to the environment (environmentally sound), responsive to the needs and interests of society-at-large (socially equitable), and are economically feasible to implement and maintain” (California Sustainable Winegrowing Alliance 2001, cited in Zucca et al. 2009: 190).

It is important to note here that although there is a growing body of literature on sustainable practices, a similar problem arises within the context of the sustainability and wine tourism relationship in that the wine tourism dimension may not always be to the fore of research in this area (which is a similar problem to that which exists for writings on the biosecurity and wine tourism relationship as mentioned in the previous section). Although Ohmart (2008a) writes of a synchronicity that can be achieved when the goals of sustainable winemaking practices are in tandem with both the local community and the natural environment, the development of sustainable winegrowing presents a number of challenges to existing practices within wine production and marketing (Hall & Mitchell 2008; Alonso & Liu 2012). Not only have there been changes made to production methods, but also the move towards sustainable practices within the wine industry has created several significant issues: first, the adoption, implementation and governance of these practices; second, how these sustainable practices are promoted in terms of brand positioning and competitive advantage; and, finally, whether sustainable winegrowing represents a pathway towards long term economic viability for wineries.

2.6.1 Sustainability from the stakeholders' perspective

The recognition of importance of sustainability issues occurs on multiple levels both internal and external to the winery concerned (Scott et al. 2005; Marshall et al. 2010; Alonso & Liu 2012). First, stakeholders perceive sustainability as an important source of competitive advantage which can transfer into a positive, environmentally conscious image in the mind of the consumer (Nowak & Washburn 2002) resulting in increased sales and brand loyalty (Sen et al. 2006). Secondly, wine producers face an extremely competitive business environment given a decline in per capita wine consumption, the increased internationalisation of wine sales, and shifts in consumer taste (Hall & Mitchell 2008). Barber et al. (2009) point out that the knowledge which stakeholders possess regarding environmental issues is also an important factor associated with

their involvement environmental issues, and that this carried forward into the subsequent purchase behaviours and brand loyalty towards particular wineries.

2.6.2 Sustainability as a form of competitive advantage

The adoption of sustainable practices as a point of differentiation has been noted as a growing trend among wineries (Flint & Golicic 2009; Casini et al. 2010; Atkin et al. 2011; Grimstead 2011; Carmichael & Senese 2012). The way in which the end product reaches consumers has become important when considering environmental issues such as carbon emissions and food miles undertaken in the journey from the vineyard to final consumption (Nowak & Washburn 2002). Attracting wine tourism via the promotion of sustainable methods of onsite viticultural production is another path which is being used pursue competitive advantage and build brand equity (Nowak & Washburn 2002); this pursuit, although undertaken in the interests of protecting the immediate environment, does not always marry with the political and ecological realities of sustainability needing to be understood at a global scale (Hall 2010b). Therefore, to be truly sustainable, wine growing needs to understand the environmental, social and economic effects on both its supply chain and distribution channels. Both Frochot (2000) and Barber et al. (2010) emphasise the importance of these effects for wine tourism marketing. (Barber et al. 2010: 167) states that those involved with the marketing of wineries should ensure that “in order to increase purchase intention of an environmentally responsible product, such as visitation to ecological wine regions, consumer promotion should address both environmental and individual product consequences” (Barber et al. 2010: 167).

Economies of scale are critical to the implementation of sustainable practices; on this note, Zucca et al. (2009) contend in their study of sustainable viticulture practices in California that it appeared to be the larger wineries that had the resources and financial means to pursue their locally based sustainability program. Their study indicated that there appeared to be a slower rate

of adoption by smaller vineyards that were less financially empowered (Zucca et al. 2009). Shaw et al. (2011: 1091) put forward the idea that the three social processes of “innovation, cultural change and co-operation” are critical to the adoption of sustainable practices based on their research in the Lodi wine region of California. Carmichael and Senese (2012) add to this idea in their study of two contrasting Canadian wine regions (the Niagara Peninsula of Ontario and the Okanagan Valley of British Columbia) that the adoption of sustainable practices is also dictated by the stage of business development of each individual winery. This scenario suggests what Wall (1997) described as a delicate balancing act; a balance that creates synergy between the supply and demand forces at work in order to maintain both a competitive and viable market position whilst addressing both political and ecological concerns (Skinner 2000; Zucca et al. 2009; Hall 2010b; Carmichael & Senese 2012). In contrast, Alonso (2010: 168) suggests that a lack of institutional support is hampering the adoption of sustainable practices by some Australian wineries

2.7 Innovation

Innovation is defined as being “the development or introduction of any new or significantly improved activity” (OECD & Statistical Office of European Communities 2005) undertaken by participants, and encompasses any products, processes and methods that may have been first developed by a particular organisation that have since been adopted by others (OECD et al. 2005). Innovation is increasingly seen as an important element of wine tourism, particularly as environmental concerns such as the adaptation and mitigation of climate change are pertinent issues in the current climate for wineries. “Innovation is a complex, multiple dimensional process that involves scientific and technical expertise, technical and educational infrastructure, integrated product and supplier networks and effective management and marketing strategies and government support” (Pickersgill & Edwards 2005: 8). Treatment of this complexity needs to be

addressed at all levels of governance (Curtain 2004) within the wine industry in order to ensure the successful implementation of innovative processes and techniques.

2.7.1 The four main categories of innovation

Extant literature in the field of innovation has pointed towards four main categories that exist consisting of product and process innovations with the addition of organisational and marketing innovations (OECD et al. 2005). Product innovations include significantly improved goods and services, and have been noted as also encompassing the activities that tourists may experience and participate in when visiting destinations (Sørensen 2001; Stamboulis & Skayannis 2003; Hall 2009). In the context of sustainable winemaking, this notion applies to two dimensions; first, wine tourists who are attracted to wineries because of the process and production methods used on site fit within their political ideology; second, the end consumer who purchases a particular brand of wine because it is manufactured using sustainable methods.

Process innovations are the new or improved methods of production or delivery within an organisation that aim to improve efficiency and flow (OECD et al. 2005; Hjalager 2009). These are associated primarily with the implementations of new technology designed to achieve specific managerial objectives (Yuan et al. 2006; Ohmart 2008b; Bessant et al. 2009; Giuliani et al. 2011). Organisational innovations are deemed as those which improve existing business practices, workplace organisation or relations external to the firm (OECD et al. 2005). Finally, marketing innovations are any new or significantly improved marketing methods that may have been adopted by the organisation (OECD et al. 2005) in order to either increase market share or facilitate entry into new markets.

2.7.2 The relationship between wine tourism and innovation

Wine tourism and innovation is an area where many different streams of literature exist; early studies in this area include the work of Hoerner (1995) which examined the competitive advantage which could be gained through adopting innovative practices utilising market research within the wine industry. This study also focused on legal aspects such as patents and intellectual property from the supply-side perspective (Hoerner 1995). Examining how innovation serves to improve wine production techniques (Aylward 2002; Gilinsky et al. 2008; Preston-Whyte 2008) has also led into research into the effect of innovation on wine exports (Aylward 2004a, 2004b, 2004c; Olavarria et al. 2009) and the levels of knowledge sharing which exist between wine producers (Chiffolleau 2005; Aylward 2005a; Bou et al. 2008; Pickersgill & Edwards 2009). Studies have also been conducted which attempt to provide a benchmark for innovation (Getz & Brown 2006) and review how successful tourism developments have benefited from the implementation of organisational, production or process changes (Hjalager 2009).

Possibly the most prominent stream of writing within this domain exists in research into how innovation affects the level of collaboration and co-operation between wine clusters and networks (Kuah 2002; Aylward & Turpin 2003; Chiffolleau 2005; Aylward 2005a, 2005b; Aylward 2006b, 2006c; Chiffolleau et al. 2006; Bou et al. 2008; Cusmano et al. 2008; Fleet 2008; Taplin & Breckenridge 2008; Touzard 2010; Hira & Bwenge 2011). The level of institutional support which is provided by regional and national governing bodies can also serve to increase levels of collaboration (Simpson 2005; Aylward 2006a; Guthey 2008; Powrie & O'Connor 2010; Hira & Bwenge 2011) while the demands made by regulators can impede such progress (Ewert & Henderson 2004).

The geographical proximity of wine clusters is another important factor for successful knowledge sharing between networks (Aylward 2000b; Aylward & Zanko 2006; Gilinsky et al.

2008; Giuliani et al. 2011). Not all wineries have embraced working collectively in the pursuit of innovation however. Marks and Mortensen (2003) observed that failure of product innovations resulted in a loss of confidence amongst producers, which then went on to affect the rates at which future innovations were adopted by other wineries within the network (Kaine et al. 2007). Pike and Melewar (2006) note that the protection of business reputation and brand identity was paramount amongst network members as no one wanted to be associated with an innovation which had failed to succeed.

2.7.3 Measuring innovation within the international wine industry context

Hira and Bwenge (2011) touched the adoption of innovative practices in wineries in British Columbia with a set of informal questions which were not based on the OECD et al (2005) framework. Winemakers who were surveyed in this study reported to Hira and Bwenge (2011: 58) that:

Independent consultants were the most important sources of innovation, and self-teaching seems to be the predominant modus vivendi. A few interviewees said that there was nothing new in winemaking, so no need for innovation knowledge. While some of the larger wineries have their marketing personnel who research market trends, most wineries make do or guess.

Hira and Bwenge (2011: 62) also went on to point out that “the limited nature of innovation dissemination reflects that a number of interviewees mention the lack of any agricultural extension agency for the industry”. Aylward (2002) found that in contrast to the Canadian perspective on innovation that the Australian wine industry had benefited from industry-led research and development, which fostered the image of Australia as a market leader in terms of innovation and experimentation. The need for a standardised approach towards research and development has been suggested so that both smaller, niche wineries and larger operators could

capitalise on technological advances in order to attract a greater market share both at the cellar door and on the supermarket shelf (Aylward 2002).

2.8 Cooperative Arrangements

2.8.1 Cooperative arrangements within the international wine industry

International research which concentrates on wine tourism networks and clusters has emphasised just how critical such reciprocal arrangements and connections are within the wine industry (Hall et al. 1997; Szivas 1999; Marshall & Shaw 2000; Telfer 2001a; Martin & Williams 2003; Larreina & Aguado 2008; Centonze 2010; Kesar & Ferjani 2010; Missens et al. 2010). The relationship between co-operative arrangements and innovation initiatives within the global wine industry has underlined the importance of the development of local wine routes (Gilbert 1992; Hall & Macionis 1997; Hashimoto & Telfer 2003; Jaffe & Pasternak 2004). Telfer (2001a) provided evidence of the importance of co-operative behaviours from the extensive level of collaboration which he found within the Niagara wine region where clustering behaviour was noted as moving not only beyond purely the wine and tourism business, but was also a feature within other agricultural and food organisations, regional wine councils, research bodies and Government agencies. Marshall and Shaw (2000) credit collaboration and learning as one of the main factors in success experience by Australian wine tourism clusters, and cite that both of these processes provide pathways towards competitive advantage.

Knowledge sharing which can occur amongst wine tourism networks was the focus for Turner (2010) who conducted research into the English wine industry and reported that “a number of new entrants, with the support of public or private capital, have been able to gain access to more structured sources of knowledge and critical resources than those hitherto available through informal interfirm networks” (Turner 2010: 27). European initiatives such as the Greek system of co-operative arrangement and knowledge sharing was studied by Karafolas (2005), who noted

that this initiative was based on associated leading wine producers working towards the common goal of a programme entitled “Wine Roads of Northern Greece” with a focus on investments orientated towards the “facilitation of wine tourism” (Karafolas 2005: 11). Aside from developing tourism within the local wine and gastronomy sectors, it was found that this programme also helped to support the promotion of cultural heritage, as well as improving overall quality of wine tourism related products and services (Karafolas 2005). Italy has also adopted a similar scheme which focused not only on promoting cities as part of a network of wine tourism, but also introduced innovative environmental protection initiatives (Hall et al. 2000).

Cooperation between tourism SMEs is not always inevitable however. Thomas (2005) argues that adoption of collaborative partnerships can be affected by a lack of understanding amongst businesses of policies which govern their respective industries, and why these particular policies bear any relevance to their business practices. Alonso and Li (2010) note in their study of Western Australian wineries that geographical isolation and financial constraints had inhibited the formation of alliances and affected the degree to which collaboration had occurred. Collaboration is an essential factor in the success of wine clusters as Centonze (2010) discovered through research into the Hudson Valley wine region in New York State. Mueller and Sumner (2006, cited in Centonze 2010: 10) point out “that the wine industry can operate more effectively and competitively when participants have access to public goods such as public research, industry standards, and collaborative local networks and associations” which demonstrates the strength that wine clusters can provide in terms of regional development. Grimstead (2011: 16) surmises the positive effect that clusters can have on wine tourism policy development through the following statement:

Wine tourism areas comprise a complex layer of environmental demands and challenges for both providers and tourists. The use of a cluster framework to analyse these issues will

lead to a greater understanding of the differences between perceptions of sustainability in the tourism and wine producing aspects of the businesses, differences between big or small businesses and differences in the way two countries deal with and support sustainable practices.

2.8.2 Alliances

The need for redefined marketing strategies which focus on building wine tourism demand has resulted in intensified levels of collaboration between wineries and like-minded business, such as accommodation, cafes, restaurants, boutique food producers and craft makers (Telfer 2001a). These partnerships are important in order to increase visitor traffic within wine regions as a higher premium can be charged by selling wine directly to tourists on-site than through wholesalers who deal with retail stores (Brunori & Rossi 2000). Restaurants view the profit that can be made on local wines as a valuable stream of revenue (Macionis & Cambourne 1998a), while tour operators use these networks to create packages which are not only based around visits to the producers of local cuisine, but can also be utilised to promote annual attractions such as wine festivals (Brown & Getz 2005). Barber et al. (2008) cite the example of the Napa Valley wine region in California where the intertwining of local food and wine related business has proved to be a valuable source of distribution for local produce; this is supported by the assertion of Hall et al. (2000) that collective networks and collaboration between wine-related businesses is crucial to off-site marketing strategies.

Porter (1990) offered the definition of a cluster as a group of interconnected companies and associated institutions which exist in geographical proximity, but also share a common and complementary bond in terms of production. Clusters and the alliances that form through shared bonds based on production techniques and knowledge are incredibly important in wine and food tourism, as Macionis and Cambourne (1998b: 19) suggest:

By actively developing linkages, focusing on consumer needs, and identifying cross-promotional opportunities the wine, food and tourism sectors can develop a strong regional culinary image, while at the same time greatly increasing their share of the tourist dollar.

Strategic links operate across governmental, regional and sub-regional levels within the wine industry, and relationships formed by wine and tourism organisations can serve to strengthen destination brands through the acts of collaboration and cooperation (Tzimitra-Kalogianni et al. 1999; Gnoth 2002; Demhardt 2003; Simpson & Bretherton 2004; Di-Gregorio & Licari 2006; Alonso & Northcote 2008; Alonso 2012; Hojman & Hunter-Jones 2012).

Telfer (2001b) notes that strategic alliances formed along Canada's Niagara Wine Route have served to increase sales of both wine and wine-related merchandise as well as expanded the local wine tourism industry, and in particular cites the example of "Tastes of Niagara", an initiative which aligns producers, chefs, farmers' markets, wineries and tour operators (Telfer 2000a, 2000b) in the promotion of local produce. Wargenau and Che (2006) studied the development of alliances within the emergent wine trail of Southwest Michigan in the United States, and found that relationships formed within this region allowed for joint advertising, promotion and production opportunities. Taplin (2010) focused on the Napa Valley wine region of California, and found that for wine producers cooperation was crucial for knowledge sharing and had helped to create an industry which was "unambiguously associated with the production of high status products, the means whereby such excellence could be easily replicated with sufficient resources increased" (Taplin 2010: 21). This situation provided something of a double edge sword for existing wine producers in the Napa Valley region however, as new firms which entered this market had easier access to existing tacit knowledge, and were found by Taplin (2010) to be investing less in relationship building, which went against the co-operative nature of the networks in the area. Taplin and Breckenridge (2008) argue that knowledge sharing between wineries can actually cause a decline in levels of innovation; in their research into the North

Carolina wine region in the United States, this study found that “co-operative relationships that involve information sharing between individuals within the industry (particularly winemakers and growers) persist, but asymmetrical relations between large and small firms are emerging and this might eventually erode the innovation potential of this dynamic cluster” (Taplin & Breckenridge 2008: 7). Missens et al. (2010) studied collective entrepreneurship in the wine industry and found that this was vital within indigenous populations to create opportunities for economic development, while Larreina and Aguado (2008) demonstrated in a case study conducted in the Spanish wine region of Rioja that it was possible to measure the economic impact which wine clusters on a local economy. This particular region featured a high degree of smaller SMEs clustered within a small geographical proximity which had significant impact on the local economy (Larrena & Aguado 2008). This effect on the economy of Rioja was compared to that of Chilean wine regions which are spread out over a narrow stretch of land, which led Larreina and Aguado (2008: 155) to surmise that “the lack of spatial proximity and commonalities is evident in the Chilean wine sector”, and this had served to hamper efforts to develop successful clusters throughout the country. Hojman and Hunter-Jones (2012: 20) note that Chilean wine tourism was also being held back by the attitudes of some winery managers towards wine tourists, and offered the following advice:

Consumers, who live thousands of miles from the respective wineries, literally on the other side of the world, are buying high quality, very expensive wines. Some of these consumers visit, or revisit, the producing country and winery. They expect high, or top, quality hospitality services, and they are prepared to pay accordingly. Refusing to provide the hospitality services expected by international consumers is incompetent winery management. Some of these visitors are already in a long-term relationship with the wine, if not the winery (even if the winery management does not know that they are). As to the rest of the visitors, their visit offers the winery a unique opportunity to start such a relationship.

Hira and Bwenge (2011) argued that because wineries were in the same industry they were forced to co-operate, and conducted research in the Canadian region of British Columbia which demonstrated that with appropriate levels of institutional support it was possible for even small wineries to become involved in exporting their products. For this to occur though a long-term strategic vision was required, as Hira and Bwenge (2011: 77) contend that “adjustments cannot occur in the absence of a long-run view of the industry as a whole, or the growth of the policy and collective networks of the industry”.

2.9 Tourism and Marketing

2.9.1 Destination attributes

Destination attributes have been acknowledged as providing a critical component in the marketing strategies utilised in wine tourism (Charters & Ali-Knight 2002; Getz & Brown 2006). The scenery, setting, climate, and experiential elements have all been noted as playing a significant part in attracting visitors to wineries (Getz 1999; Williams 2001a). These attributes build on the suggestion by Carlsen and Dowling (1998: 25) that wine tourism can also encompass non-wine related activities, and that visitors can be “motivated both by the region and by opportunities to experience wine tasting”. Positioning wine regions based on their unique destination attributes has been cited as an important factor as the number of wine regions competing for wine tourist continues to grow (Williams 2001a). Creating an extraordinary experience based on “destination images that differentiate one region or product from the next must be based on a strong appreciation of distinct natural and cultural elements, which cannot be replicated elsewhere” (Williams 2001a: 54).

2.9.2 Wine and food festivals

International research into wine and food festivals is a growth area in wine tourism literature, and this highlights the importance of these events to wine tourism (Telfer 2003; Hall & Sharples 2008; Hashimoto & Telfer 2008; Rivera Jr. et al. 2009; Lee & Arcodia 2011; Axelson & Swan 2012; Kruger et al. 2012). The majority of research that exists in this domain has focused on the development of wine and food festivals and the themes surrounding these events (Cambourne et al. 2000; Frochot 2000; Australian Regional Food And Wine Tourism Network 2002; Taylor & Shanka 2002; Bruwer 2002c, 2003; Telfer 2003; Hashimoto & Telfer 2006; Hall & Sharples 2008; Houghton 2008; Barth & Salazar 2010; Lee & Arcodia 2011; Kruger et al. 2012), while the location of festivals has also been noted as an important factor in their success (Cambourne et al. 2000; Frochot 2000; Hall et al. 2000; Taylor & Shanka 2002; Telfer 2003; Hall & Sharples 2008; Axelson & Swan 2012; Poisson & Chen 2010). Participation in wine and food festivals has been noted as providing an important opportunity for relationship marketing between wine brands and festival attendees (Yuan et al. 2004; Yuan & Jang 2008) and attempts have been made to classify exactly who are attending these events (Houghton 2008). The synergy of wine, travel and a special event is valuable for attracting younger consumers (Yuan et al. 2004; Poisson & Chen 2010; Axelson & Swan 2012), which in turn creates an ideal scenario to introduce future target markets to wine tourism. Getz (2000) points towards wine festivals as being important in terms of not only educating consumers, but also providing a link between producers and buyers within the industry, which also encompasses operators of tourism ventures. This assertion is also supported by Axelson & Swan (2012) who contend that wine regions need dedicated wine events in order to promote their products, and the chance to showcase a large variety of wines in a centralised location cost-effectively has not only attracted many wineries to become involved in festivals, but has also struck a chord with consumers (Tassiopoulos et al. 2004; Yuan et al. 2004).

Wine festivals have been recognised as having a positive effect on future winery visitation in a survey of Australian wine festival attendees by Houghton (2001, 2002). This research found that there was a high level of repeat visitation of respondents to the same wine festival whenever it occurred, and a positive festival experience also made attendees more willing to attend other wine festivals (Houghton 2001, 2002). Houghton (2001, 2002) also found that there was an increase in the amount of wine purchased by festival attendees when compared with purchase behaviour prior to attending a festival. Mason and Paggiaro (2012: 7) declare that “the organisers of food and wine events are asked to create a positive experience for the visitors, as positive emotions linked to products and the event itself are factors influencing satisfaction and consequently behavioural intentions of festival participants”. Wine festivals also have the potential to introduce a whole new group of consumers to wines from a particular region (Houghton 2001, 2002), and the growing relationship with food tourism is one which offers wine tourism plenty of scope for future growth (Smith 2000; Telfer 2003; Plummer et al. 2005; Hall & Sharples 2008; Alonso & Liu 2011). The result of this is that alongside cellar door sales, wine and food festivals are now regarded as key components for the promotion and marketing of wine tourism to consumers (Hall & Sharples 2008).

2.9.3 Regional tourism promotion

Regional tourism promotion plays a vital role in attracting visitors to local wineries, and as a result forms a rich platform for international wine tourism research with studies conducted in Australia (Hall & Johnson 1997; Morris & King 1997a; Hall 1998; Hoffman et al. 2000; Schrieber 2004; Alant & Bruwer 2010), the Mediterranean (Hall & Mitchell 2000), Canada (Telfer 2001a, 2001b; Wilkins & Hall 2001), Chile (Sharples 2002; Woods 2002) and South Africa (Bruwer 2003). Such forms of promotion can be seen through the wealth of brochures, festivals, exhibitions, wine trails, travel shows and internet sites that are dedicated to spreading information to those who might be considering visiting a winery. Lockshin (2001) cites the use

of geographical indicators as being an important tool in regional branding that is used in Australian wine regions. Websites which focus on the theme of regionality have been found to be an important catalyst to the development of long-term relationships with the various brands that might co-exist within a particular region (Houman 2005, cited in Thach 2009). Beames (2003) notes that the integration of promotional material is important to selling the wine tourism experience as a total package to the end consumer, and comments that “wine tourism also needs to consider how it fits in with and connects to, other activities within a regional area” (Beames 2003: 209).

Wine tourism has provided direct benefits through regeneration of rural areas which have previously been in decline, and this has been proven in studies of improvements made in tourism infrastructure in European wine regions (Hall et al. 2000; Hall & Mitchell 2000). Regional growth has also been observed by Morris and King (1997b) as directly benefiting individual wineries in the Augusta-Margaret River region in Western Australia. The grouping of wineries within regionally branded wine regions is noted as being an important factor in the growth of wine regions in South Australia through research by Alant and Bruwer (2010) which developed a theoretical perspective based on winery visitation sets (VSs) which demonstrated “that the visitation patterns of wine tourists to winery cellar doors can be conceptualised as a theoretical construct” (Alant & Bruwer 2010: 206) which showed a direct link to repeat visitation. This reveals how crucial visitation patterns are to promotional and branding strategies not just at the level of individual wineries, but also at the regional level as well (Alant & Bruwer 2010). The integration of regional and national strategies with wine tourism has also been observed as being vital to effective tourism promotion in the Mediterranean region (Hall & Mitchell 2000; Veres et al. 2008); the observation that “wine regions in the Mediterranean have come to rely on tourism marketing clichés in relation to the wine heritage of a region, or to concentrate on developing wines and experiences that have little to do with the region” (Hall & Mitchell 2000: 47) point

towards the dangers inherent when there is an absence of a coherent regional wine tourism promotional strategy in place.

2.10 Chapter summary

From an international perspective, it is apparent that wine tourism offers substantial opportunities in terms of growth for businesses who wish to engage with their customers directly; forms of direct dialogue with wine tourists can not only be created at the cellar door, but also through participation in wine and food festivals and events. These opportunities not only represent a chance for wineries to expand their existing market, but also aid in networking and cooperation. However, challenges need to be addressed in terms of the issues that this direct contact creates though, particularly in the area of biosecurity. The following chapter will illustrate the contribution that New Zealand based wine tourism research makes to helping to address these challenges while still highlighting the opportunities that are present within this body of literature.

Chapter 3

New Zealand research on wine tourism

Wine tourism research in New Zealand first came to prominence in the mid-1990s (Mitchell & Hall 2006), and originated through the intersection of academic writings in the areas of rural and special interest tourism (Hall 1996, 2005a; Hall & Johnson 1997; Hall et al. 2000) and research on wine consumer behaviour (Hall & Johnson 1997; Longo 1999; Machin 2000; Mitchell 2004; Mitchell & Hall 2006). As two-thirds of the literature within the domain of global wine tourism research has been reported as coming from both Australia and New Zealand (Mitchell & Hall 2006), it is important to note that research which has previously been conducted within the local industry is obviously still significant in exploring the challenges that face the New Zealand wine industry, and may also potentially be of significance to international wine regions.

The first New Zealand based academic writings on wine tourism began with the work of Reid (1990) who conducted research on the potential that the New Zealand wine industry appeared to offer tourism. Navigating a variety of differing viewpoints collected from New Zealand based viticulturists through regional case studies allowed Reid (1990) to showcase the state of the local wine industry from a supply side perspective. As locally based research into wine tourism has grown and been seen to develop “a degree of sophistication” (Mitchell & Hall 2006: 307), many different streams of academic literature have developed. This chapter begins by offering a historical context of the New Zealand wine industry, followed by an examination of the extant body of literature that has emerged on wine tourism in New Zealand. Tables provided throughout this chapter will also highlight the key findings for each section that featured in the 1997 and 2003 surveys in order to underline their relationship to the literature.

3.1 Historical overview of the New Zealand wine industry

When considered in comparison to other international wine producers such as France and Italy, New Zealand is a new entrant to the global wine industry. This chapter will provide an historical overview of the development of the wine industry in New Zealand. The beginnings of the local industry will be explored before a discussion of the changes brought about to the industry by regulation and governance will illustrate some of the issues which have surrounded the growth of wine tourism in New Zealand. The position of wine within the New Zealand national brand will also be examined before current issues with oversupply in the New Zealand wine industry are highlighted.

3.1.1 Historical context

The beginnings of a New Zealand wine industry (Table 3.1) stem from the introduction of non-native wine grapes seeded from vines located in New South Wales, which Thorpy (1971) states were first planted in September, 1819 by Samuel Marsden. Arguably the very first wine tourist in New Zealand recorded sampling locally produced wine was French explorer Dumont d'Urville during a visitation in 1840 to famed Australian viticulturalist James Busby's vineyard in Waitangi (Thorpy 1971; Cooper 1993; Hall 1996; Haydn & Talmont 1997).

Table 3.1: Historical overview of the development of New Zealand wine tourism

Year	Events
1819	The beginnings of a localised wine industry start with the introduction of non-native wine grapes seeded from vines located in New South Wales which are first planted in September, 1819 by Samuel Marsden (Thorpy 1971).
1840	First wine tourist in New Zealand is recorded as French explorer Dumont d'Urville (Thorpy 1971; Cooper 1993; Hall 1996; Haydn & Talmont 1997).
1840-1890	Arrival of European winemakers with imported varieties and techniques who endeavour to push the New Zealand wine industry forward (Thorpy 1971; Hall 1996). Significant challenges arise for wine producers through threat of disease and pests (Cooper 1993).
1890s-1930s	Prohibition era gains momentum in New Zealand further hampering national wine industry development (Cooper 1993).
1976	It becomes legal to take wine into cafés or buy directly from the cellar door at New Zealand wineries (Hadyn & Talmont 1997).
1980	Vidals Winery located in Hastings offers not only wine sales, but is noted as being a pioneer in terms of also offering winery tours, a wine museum and a restaurant on site (Graham 1980, as cited in Hall & Johnson 1998).
1989	Sale of Liquor Act (1989) passed.
1990	First New Zealand based wine tourism based research study conducted by Reid (1990).
1990s-present	New Zealand based wineries gravitate towards cellar door sales as a viable alternative to sell directly to wine tourists (Reid 1990; Hall 1996; Hall & Johnson 1997; Christensen et al. 2004; Treloar et al. 2008; Charters et al. 2009; Fountain 2011). Development of local wine and food tourism networks gains momentum (Christensen et al. 2004).
1995	Sustainable wine production methods gain traction with the formation of Sustainable Wineries New Zealand (SWNZ 2010).
1997	First edition of the New Zealand National Wineries' Survey conducted by Hall and Johnson (1997). Wine Institute of New Zealand (WINZ) has 262 members registered by 1997 (WINZ 1997a).
2003	Second iteration of the New Zealand National Wineries' Survey conducted by Christensen et al. (2004). This marks the first time that this survey has asked questions regarding the biosecurity measures employed by New Zealand wineries (Christensen et al. 2004) based on research into this area by Hall (2003).
2006-present	Oversupply issues cause major problems for New Zealand wine producers (Deloitte 2010).
2009	A large harvest once again send bulk wine prices falling to below half their 2010 levels (NZ Wine 2011). New Zealand wine tourism figures are cited as 475,000 international and domestic visitors annually (Ministry of Economic Development 2009).
2011-present	New Zealand wine industry is reported to be heading towards a situation where oversupply is threatening to cripple the industry (NZ Wine 2011).

In order for New Zealand viticulture to grow beyond that of a group of mere hobbyists into a fully-fledged professional industry there needed to be an injection of expertise, and this came to fruition with the arrival of European winemakers whose imported varieties as well as techniques endeavoured to push the New Zealand wine industry into an era of greater maturity (Thorpy 1971; Hall 1996). New entrants to the local market were met with significant challenges however; the threat of disease, pests and the era of Prohibition (Cooper 1993) all served to contribute to the hardship which burdened early local wine industry pioneers. The analogy offered by Cooper (2002: 25) of an “old rollercoaster ride, soaring and plunging through successive periods of growth and optimism, decline and disillusionment” is one that still serves to accurately describe the course taken by the local wine industry to this present day.

Regulatory changes which allowed patrons to legally take wine into cafés or buy directly from the cellar door at New Zealand wineries were first introduced in 1976 (Hadyn & Talmont 1997). This can be regarded as one of the first landmarks of cultural change which made even the idea of wine tourism a possibility for New Zealand winegrowers. The appetite for wine tourism was slow to gain traction amongst winery owners though. Graham (1980, cited in Hall & Johnson 1998: 2) noted that in 1980 that the pioneering establishment of Vidals located in the North Island city of Hastings offered “not only wine sales, but a winery tour, a wine museum and a restaurant”. It is clear from the outset that New Zealand wine growers approached the idea of wine tourism with a degree of both skepticism and cynicism, and it would take the development of a higher level of sophistication (Mitchell & Hall 2006) within the local wine industry over the next two decades for the concept of wine tourism to be even seriously considered as a tool for educating consumers, encouraging brand loyalty and supplying an attractive additional source of revenue for wineries.

Whilst wineries overseas in both Old and New World wine producing regions gradually adopted wine tourism over time as an additional source of revenue which remained unconstrained by the

margins enforced through wholesale and retail distribution (Hall & Johnson 1998; Hall et al. 2000). The rate of adoption of wine tourism was much slower in New Zealand primarily through an initial lack of institutional support and expertise, which particularly affected smaller winegrowers who were often unable afford to access existing local distribution channels (Hall & Johnson 1998). This low level of support also manifested itself by hampering exports of New Zealand produced wine by smaller companies lacked the necessary capital, experience and knowledge of how to operate competitively amongst the same international distribution networks that larger companies employed (Hall & Johnson 1998). As a consequence, smaller New Zealand based wineries gravitated towards cellar door sales, which emerged as a viable alternative to sell directly to visitors (Reid 1990; George 1996; Hall & Johnson 1998; Beverland et al. 1998a, 1998b; Beverland 1999b, 1999c, 1999d, 2000; Christensen et al. 2004; Treloar et al. 2008; Charters et al. 2009; Fountain 2011). Perhaps the biggest obstacle towards wine tourism in New Zealand though has been the attitude of wine producers themselves towards it; Hall and Johnson (1998:3) refer to this in their summary of the first edition of the New Zealand National Wineries' Survey:

Tourism has a key role to play in providing a customer base for the many New Zealand wineries that would otherwise find distribution prohibitively expensive. However, many wine producers do not perceive themselves as offering a tourist product and are unaware of how to best attract visitors to their vineyard.

Christensen et al. (2004) found that this attitude towards wine tourism had shifted somewhat in their iteration of the New Zealand National Wineries' Survey conducted in 2003. This study observed that there appeared to be a more positive attitude exhibited by the supply-side perspective towards wine tourism in New Zealand, and suggested that this was due to a "greater awareness of the value of wine tourism" (Christensen et al. 2004: 6). The development of local wine and food tourism networks which had occurred over this period was also noted as significant, and this in itself pointed towards a greater degree of industry confidence where the

perception was now one where New Zealand wineries were beginning to recognise “wine tourism as a significant opportunity to increase their wine sales” (Christensen et al. 2004: 6).

3.1.2 Governance and regulation within the New Zealand wine industry

As the New Zealand wine industry developed it became clear that there was the need for a system of governance to be implemented in order to provide a clear vision and strategy for the future direction of the industry. The Wine Institute of New Zealand (WINZ) was established as a result of this in 1976 through the *Winemakers Levy Act 1976* in order to provide a coordinated strategy for the New Zealand wine industry (WINZ 1998), and this was followed by the *Winemakers Act 1981* which ensured the registration of wine producers (Robertson et al. 1997). Much of the *Winemakers Act 1981* was repealed by the *Sale of Liquor Act 1989* which introduced a levy on wine sold on the New Zealand domestic wine market (Hall & Johnson 1998). WINZ were primarily responsible for ensuring New Zealand wine featured in trade shows, and was promoted within trade and media networks (WINZ 1997), and were also involved in resource management and issues surrounding quality control (Hall & Johnson 1998; WINZ 1998).

Exporters of New Zealand wine were originally supported by the New Zealand Wine Exporters Board and the New Zealand Wine Guild (Hall & Johnson 1998). This early level of institutional support within the export industry has grown so that by 2011 New Zealand wine exporters now can seek assistance from a myriad of different sources; the Ministry of Economic Development, New Zealand Winegrowers, Trade New Zealand, Sustainable Wines New Zealand (SWNZ), NZ Wine, Tourism New Zealand, NZGVIG (NZ Society of Viticulture and Oenology), and 100% Pure New Zealand are all organisations involved in the current promotions and strategies behind New Zealand wine exports (Hall & Johnson 1997; Christensen et al. 2004) which form the basis of what is known as Brand New Zealand (Spratt 2010).

3.1.3 The positioning of New Zealand wine within the national brand

The somewhat idealistic personification of the New Zealand national brand with emphasis placed on the three traits of clean, green and pure (Hall 2010a; Marshall et al. 2010) is one which has been criticised as being at odds with the overseas perception of New Zealand, including wine exports (Beverland & Lindgreen 2002; Clayton & Stevens 2007; Cumming 2010). Criticism has been levelled particularly in terms of the food miles involved in such exports (Gabzdylova et al. 2009; Kennedy 2009; Kemp et al. 2010). As an early adopter of the Brand New Zealand strategy (Spratt 2010), New Zealand wine has been marketed internationally as being born of an industry that is both sustainable and innovative (Kennedy 2009). The image portrayed is one where industry-wide sustainability initiatives are readily accepted and incorporated into wine production, with NZ Winegrowers (2011: 21) claiming in their 2011 annual report that ‘over 95% of our vineyard area and wine production is now participating in this Sustainable Winegrowing programme’. NZ Winegrowers (2011: 21) also state:

Over the last year we have conducted research in our main markets, and have had conversations throughout the value chain. We have asked them what their concerns are with respect to sustainability, how we rate, and how they would like to learn more about what we do. They tell us we need to provide a layered message; building simple awareness with consumers, providing assurance to our customers that we won’t let their brand down, and that it must be backed up with evidence.

These claims raise important issues as to where the current position of New Zealand wine in the context of sustainability really lies, as it would appear to suggest that the introduction of sustainable practices within the New Zealand wine industry has been without problems. However, this is just one of the significant issues currently affecting the New Zealand wine industry as oversupply issues create their own set of challenges.

3.1.4. Oversupply issues and their effect on the New Zealand wine industry

Recent problems for the New Zealand wine industry have come from closer to home however. NZ Wine (2011) reported that the industry was heading towards a situation where oversupply was threatening to cripple the industry. “New Zealand’s wine production volume surged nearly 40 per cent on 2007, with Sauvignon Blanc leading the charge, up 65 per cent. The high output was driven by good weather and the maturing of large scale new plantings in Marlborough” (NZ Wine 2011: 9) which resulted in key markets experiencing a situation of oversupply. This problem is one which remains unresolved with NZ Wine (2011: 9) stating:

Another large harvest in 2009 compounded the situation. In response, wine exports made a rapid, adverse mix shift to bulk wine as wineries urgently tried to clear tanks and generate cash flow. Bulk wine prices tumbled to below half their 2007 levels and bulk wine rose from approximately 5 per cent to 30 per cent of exports by volume. What emerged was a lower-priced segment, chiefly in the UK and Australia, serving large retailers’ previously unmet demands for exclusive brands and private labels from New Zealand.

The New Zealand wine industry had, in the period leading up to this scenario, gone from the situation where the Wine Institute of New Zealand (WINZ) had at the time of the first New Zealand National Wineries’ Survey in 1997 stated that “the Wine Institute of New Zealand could boast 262 members and a high degree of technical excellence” (WINZ, 1997, cited in Hall & Johnson 1998: 2) to where there are over 500 wineries listed as operating in New Zealand (Winetitles 2009). Deliottes (2010: 7) remark that “marketing product overseas, exchange rates and grape supply appear as the top three issues (in various combinations) for the four largest winery categories and two of these issues appear in the \$NZ 0-1 Million category’s top three”. As New Zealand wineries struggle to counter this issue of oversupply, it remains to be seen whether cellar door sales and the promotion of wine tourism can alleviate this current crisis or whether the “rollercoaster ride” that Cooper (2002: 25) predicted has come to fruition.

3.2 Winery profile

Mitchell and Hall (2006: 309) note how many New World wine producers “are taking advantage of the wine and tourism relationship and are now hosting visitors to their cellar door as a key element of their business” which also serves to maximise profit margins and build brand loyalty (Hall et al. 2000). One of the reasons for the importance that has been placed on wine tourism as an additional source of revenue is that the New Zealand wine industry is currently in a situation where stability of both profits and production has become increasingly hard to maintain (New Zealand Winegrowers 2009). Problems have been seen to manifest if winery visitation is not treated as an important component in the context of the overarching business strategies of winegrowing (Hall et al. 2000; Mitchell & Hall 2006). The addition of tourism to an existing business might serve to give a winery appeal at a regional level, but it may actually also be detrimental in terms of returning added revenue to the business particularly if little thought has been given as to how to incorporate tourism into the market offering of the winery itself (Hall et al. 2000; Mitchell & Hall 2006). Deliottes (2010: 6) even suggested:

A clear trend has emerged of profitability steadily decreasing over the past two years from our vintage 2007 survey. It seems highly likely that this trend will continue into the vintage 2010 survey as some of the other concerns arising start to create significant financial volatility.

Literature which describes New Zealand winery characteristics focuses primarily on geographical location, winery size, and whether or not additional value based propositions such as cellar door sales and in-house tasting facilities are available onsite. Each of these aspects will now be examined in turn. Table 3.2 provides a summary of results from the 1997 and 2003 surveys on winery profile.

Table 3.2: Summary of results from 1997 and 2003 surveys on Winery Profile

Year	Author	Results
1997	Hall and Johnson	<ul style="list-style-type: none"> -The small scale of many winemaking operations is indicated by 78 per cent of wine producers reporting they employ less than six full-time employees. - Producers placed great importance on cellar door sales. - Of those producers who charge tasting fees, nearly half (48 per cent) give some sort of refund, while 37 per cent gave no refund and 15 per cent did not specify the amount they refunded. - Wine tasting is the most widely offered service at 93 per cent. Winery and vineyard tours are offered by 57 per cent and 44 per cent of wineries respectively. A picnic or entertainment area is the most widely supplied facility, and is found at over 53 per cent of wineries. - 69 per cent appear to have wheelchair access to the tasting room, while winery and vineyard access is more restricted.
2003	Christensen et al.	<ul style="list-style-type: none"> - Increased number of wineries with a turnover in excess of \$750,000. - Cellar door access and tasting fee charging were seen as both declining. - Overseas and 40 plus age group visitors have increased since 1997. - ‘Wine lover’ segment increasing. - Wine tasting is the predominant reason for visiting. - Increasing number of wineries forming part of a commercial wine tour.

3.2.1 Winery Location

Location has been noted as a challenge for wine producers by Taylor et al. (1998) who argue that geographical distance and the absence of infrastructure to support the marketing efforts of wineries could in fact inhibit tourists from visiting local wineries. Previous studies of the relationship between the distance function of a winery from its nearest major geographical centre have been conducted (Hall & Johnson 1997; Christensen et al. 2004) in order to determine whether the proximity of a gateway city to a vineyard provides a catalyst for increased visitation by wine tourists. Research in this area has also focused on the length of time in which visitors engage in wine tourism activities, and whether their journeys are purely limited to daytrips or longer stays at the winery concerned (Hall & Mitchell 2002a). Scenery also plays an important part in attracting visitors (Austin 1993; Mitchell 2005) and has been noted as playing a crucial role in the pre-visit anticipation, the on-site experience itself, and the post-visit reminiscence of wine tourists (Mitchell 2005).

3.2.2 Winery Size

New Zealand wine production is characterised by both small boutique style wineries and larger operations (Hall 1996; Hall & Johnson 1997; Barker et al. 2001; Christensen et al. 2004; Wine NZ 2010). Prior studies by Hall and Johnson (1997) and Christensen et al. (2004) have examined whether size is an important factor in New Zealand wineries' ability to provide a memorable wine tourism experience. Aside from obvious differences such as the number of employees and the output of wine production that each operation is able to undertake, Hall (1996) suggests that there is a significant difference between large scale and small scale operations in their attitude towards cellar door sales. While tourism has become vital to the financial survival of smaller operators some of the larger wineries have remained ambivalent towards the potential additional revenue offered by cellar door sales (Hall 1996).

3.2.3 Ownership status

Determination of appropriate wine tourism marketing strategies is strongly linked with the ownership status of the winery concerned and the level of resources which are available to implement such changes (Beverland et al. 2000; Simpson & Bretherton 2004a; Simpson et al. 2005; New Zealand Institute of Economic Research 2009). Winery ownership within the New Zealand wine industry commonly exists at either one of the following five levels; that of sole proprietor, a public company, a partnership, trust or a private company. Hall and Johnson (1997) and Christensen et al. (2004) examined previous trends in ownership status in order to determine the effect that these have on annual turnover. These studies noted that the ability of wineries to adequately deliver a positive wine tourism experience relies heavily on there being sufficient staff employed to ensure that all visitors are catered to at the cellar door (Hall & Johnson 1997; Pitcher 2002; Christensen et al. 2004).

3.2.4 Cellar door sales

Cellar door sales provide an important source of revenue for small New Zealand wineries, whilst this particular point of sale is regarded by larger wineries as a component of their overall public relations focus (Hall 1996; Hall & Johnson 1997). The effectiveness of cellar door sales are somewhat a point of contention within the New Zealand wine industry however, as Deliottes (2010: 21) suggest in their Vintage 2009 annual New Zealand wine benchmarking survey where after basing their survey on a sample size of just six per cent of the New Zealand wine industry they were moved to state:

In the 2008 vintage survey, it was noted that only the two smallest categories were transacting directly with the end consumer of their wines through online and cellar door sales, albeit at a relatively low 14 per cent of total distribution channels. This raises the question of how wineries maintain a dialogue with their customers. The 2009 survey reveals that sales through “direct” channels have now dropped to around six per cent for

the three smaller categories, and just two per cent and one per cent for the NZ \$10 to 20 million and the NZ \$20 million plus categories respectively.

Dialogue with customers can be extended by offering visitors the opportunity to become part of a direct mailing list at the cellar door (Hall & Johnson 1997). Wine-related merchandise is also available directly to visitors as well, which serves to reinforce the importance of the cellar door in terms of brand development and promotional opportunities. Mitchell and Hall (2006) have confirmed with their research of New Zealand wineries that the cellar door does have a degree of influence over post-visit purchase behaviour, and that a positive experience can serve to reinforce the “relationship with the winery and its wine” (Mitchell & Hall 2006: 48).

3.2.5 Tasting room facilities

Encouraging loyalty appears to be critical to wine tourism. A study by Alonso (2008) found that the majority of winery visitation was undertaken by domestic travellers in New Zealand. A lack of knowledge regarding New Zealand wines and wineries on the part of international visitors was found to be a key reason why they did not choose to visit one or more wineries during their stay (Alonso 2008). Charters et al. (2009) note that the operation of tasting rooms carries a financial burden for the winery concerned, and that there has been little research into whether charging a tasting fee affects the experience of the wine tourist. It has also been proposed that the service dimension of the winery experience influences the obligation to purchase the product (Kolyesnikova 2006, cited by Charters et al. 2009), whereas in contrast Roberts et al. (2006) argued that visitors actually expect no tasting room fees to be charged. Treloar et al. (2008) found that charging a tasting room fee actually impacted negatively on long-term customer loyalty, particularly the Generation Y market. Such confusion clearly reinforces the need for further research in this area.

3.3. Visitor profile

Hall et al. (2000a: 4) write that the wine tourism experience is built on a marriage between the “attributes of the wine tourist and the wine tourism product”. This involves not only wineries and their settings in terms of scenery and ambience (Hall et al. 2000a), but also couples this attractiveness with the other distinct qualities which a particular region can offer, such as culinary delicacies and complementary tourist activities. Mitchell and Hall (2006) note that research which attempts to actually quantify visitor numbers to wineries has been compromised by the use of differing scale measures and estimation methods which Johnson (1998) determined caused a lack of statistical consistency as there was no standardisation of such measures. It has been suggested such figures show the magnitude of visitation in particular locations (Hall et al. 2000; Mitchell 2004) with a bias towards consumers who purchase wine rather than focusing on all visitors and their motivations for visitation (Hall et al. 2000). Mitchell et al. (2006: 317) also cites a bias in the extrapolation of survey samples which do “not account for multiple visits per trip or include day trips of less than 40 kilometres” that has possibly caused some underestimation of the actual figures available on visitation to New Zealand wineries. Table 3.3 provides a summary of results from the 1997 and 2003 surveys with respect to visitor profile.

Table 3.3. Summary of results from 1997 and 2003 surveys for Visitor Profile

Year	Author	Results
1997	Hall and Johnson	<ul style="list-style-type: none"> - There was a clear imbalance between international and domestic visitors at 18.1 per cent and 81.9 per cent respectively. - The different motivations of wine tourists were seen to challenge the notion of wine tourism as solely special interest tourism. It was suggested that wine tourism could incite tourists to purchase wine sampled on holiday, after they had returned home. -The involvement of the tourism industry at wineries is likely to be most obvious in the form of commercial wine tours. 45 per cent of respondents indicated that their winery had been visited by a wine tour, the majority, however, had not been. - The comparatively low involvement of the travel industry supports the idea of wine tourism as a niche activity and not part of the typical itinerary of package tours. - The 'Wine lover' segment attributed for 13.6 per cent of visitors.
2003	Christensen et al.	<ul style="list-style-type: none"> - The 'Wine lover' segment showed a two-fold increase to 26.8 per cent. 'Wine interested' visitors remained constant at 65 per cent and 65.9 per cent respectively, while a significant decline was noted in the 'Wine curious' segment falling from 21.4 per cent in 1997, to 7.3 per cent in 2003. - 67.7 per cent of visitors are estimated to come from New Zealand. - There is a perceived shift toward older visitors, with all categories from 40 years of age and above showing an increase. The most significant increase is in the 50-59 years of age group, up 3.7 percentage points, while the other significant change is in the 18-29 years of age group, which fell by 6 percentage points.

3.3.1 Demographic characteristics

A small number of studies have focussed on the demographic characteristics of New Zealand wine consumers (Beverland et al. 1998, 1999; Longo 1999; Machin 2000; Mitchell & Hall 2006; Alonso 2008), with the typical wine tourist cited by Mitchell and Hall (2006: 318) as being “30-50 years of age, relatively well educated, professional, and in the moderate to high income bracket. They are domestic visitors and a substantial proportion comes from within or in close proximity to the wine region itself”. Hall and Johnson (1998) argue that typical New Zealand wine tourists are represented by younger non-residents who are well educated but earn less than the average income; this same study also goes on to note that the description of visitor characteristics tends to suffer from a lack of accuracy and comparability between countries, and suggests that further research is required in this area “to ascertain how wine tourism relates to other forms of tourism activity” (Hall & Johnson 1998: 31). Examining exactly who engages in wine tourism activities and what motivates visitation based on solid empirical evidence could in turn provide New Zealand wineries with valuable data to pinpoint significant changes or trends amongst visitor demographics (Hall & Johnson 1997; Christensen et al. 2004).

Differences in the type of visitors to New Zealand wineries have been recognised at the regional level (Hall 1996; Longo 1999; Mitchell 2004; Mitchell et al. 2000, 2001c). Studies which focus on the gender of wine tourists have pointed towards a potentially rich vein of research (Machin 2000; Mitchell et al. 2001c) which Mitchell and Hall (2006: 319) state “highlights the need for more sophisticated analysis of winery visitor demographics” instead of focusing on perpetuating a stereotypical perception of the wine tourist (Mitchell 2004). Mitchell (2004) found that there were distinct differences in the demographic characteristics of visitors within different wine regions in New Zealand; these differences existed at between males and females and between the generations, yet were also noted as occurring according to the perceived level of wine knowledge that visitors possessed and also whether visitors were domestic or international in origin.

Potential for growth at the cellar door by appealing to the Generation Y market has been an area of interest for researchers (Beverland 2001; Treloar et al. 2004; Fountain 2011; Fountain & Charters 2010). Treloar et al. (2004) found that social aspects, leisure, convenience and value for money were the main factors that marketers should be concentrating on in order to attract younger visitors to New Zealand wineries instead of the educational aspects which tended to appeal to older visitors.

An understanding of the consumer behaviour exhibited by wine tourists is also vital in order for wineries to tailor their marketing towards attracting greater numbers of visitors. Attempting to understand these behaviours led to Hall (1996) suggesting that there was a tripartite typology which existed whereby wine tourists could be classified into three areas: either as 'Wine Lovers', 'Wine Interested' or the 'Curious Tourist'. Hall et al. (1997), Christensen et al. (2004) and Houghton (2008) have used this typology to ascertain what proportions constitute each particular segment within the New Zealand wine tourism market. Wine knowledge levels amongst visitors have provided important insights in terms of consumer behaviour research of wine tourists (Hall, 1996; Beverland et al. 1998a, 1998b; Mitchell 2004; Mitchell et al. 2006). Mitchell et al. (2006) note that although lifestyle typologies which attempt to categorise wine tourists provide relatively robust frames of reference in wine tourism research they are neither commonly applied nor studied.

3.3.2 Reasons for visitation

Pioneering research into the New Zealand wine tourism industry by Reid (1990) noted that there are a multitude of reasons for winery visitation, and that wineries provide both a social and educational function from the perspective of the wine tourist. The travel experience of wine tourists has been recognised as comprising of stages: "pre-visit", "travel-to", "onsite", "travel-from" and "post visit", with each containing a range of behaviours and responses requiring

innovative marketing approaches from wineries in order to maximise business opportunities (Mitchell et al. 2004a). Meeting the wine producers themselves at the cellar door can help demystify the wine production process and add an educational dimension to the wine tourism experience (Mitchell & Hall 2003b). Social events such as wine festivals have been noted by Hall et al. (2002) as being a strong source of visitor motivation, while for other consumers the perceived health benefits of wine drinking were seen as important (Hall et al. 2000; Hall et al. 2002; Mitchell & Hall 2000a, b).

Hall et al. (1997: 10) points out that from the supply-side perspective “visitation, whether described as tourism or not, is often perceived as a cost” or described as a burden on the part of wine producers (Hall et al. 1997). Mitchell (2004) sought to discover whether New Zealand wine tourism was dictated to by the demands of seasonality, and found that patterns of repeat visitation to wineries existed, and that almost two-thirds of visitors surveyed (73 per cent) made a purchase directly at the cellar door (Mitchell 2004). Male visitors who perceived themselves to be highly knowledgeable about wine and lived locally were found by Mitchell (2004) to be most likely repeat customers of the wineries which they chose to visit. This research also found that in terms of regional visitation “visitors to New Zealand wineries visited an average of four wineries while in the region with one in four staying 1-2 days and just over half staying 3-7 days” (Mitchell 2004, cited in Mitchell & Hall 2006: 321). It was also suggested that mapping the travel patterns of wine tourists could provide a useful tool for the future development of regional wine routes which could maximise the tourism potential of existing regional wine networks and provide opportunities for future growth (Mitchell & Hall 2006).

3.3.3 Visitor attributes

Investigating whether there is a common set of attributes which feature in the consumer behaviour of visitors to New Zealand wineries has provided a contentious point of debate (Hall, 1996; Beverland et al. 1998a, 1998b; Mitchell 2004; Mitchell & Hall 2003a, 2004b, 2006). Analysis from the supply-side perspective to gain insight into consumer behaviour is a growing field of research (Johnson 1998; Christensen et al. 2004; Mitchell & Hall 2006). Mitchell and Hall (2006) cite that the most commonly utilised measures focus on the type of visit, the motivations behind a visit to a particular region, and whether or not the visit was a satisfying experience.

The amount of time and activities undertaken on-site along with any subsequent purchase behaviour exhibited at the cellar door is another area of interest, which Mitchell (2004) studied by examining onsite behaviours of visitor and whether this affected the number of bottles of wine purchased directly from the winemaker at the point of sale. Research conducted by Longo (1999) and Machin (2000) also explored the range of activities which visitors were presented with onsite at New Zealand wineries, and these studies revealed that wine tasting was the most popular pursuit; these studies also found that visitors were less inclined to take part in tours of the vineyard if they were on offer, which is consistent with the findings of Mitchell (2004) who stated that 93 per cent of visitors participated in wine tasting, while only nine per cent of visitors bothered to partake in a winery tour.

Visitors also looked for other factors when choosing which wineries to visit, with Longo (1999) finding that in terms of service quality personalised and friendly service rated highly; conversely, from the supply side perspective these factors were also rated highest by winery operators when considering what attracts visitors to their winery (Johnson 1998). Mitchell (2004) sought to expand on this angle of research through employing qualitative methods to explore the nature of

winery visitation, which is an area that remains relatively under-researched (Mitchell et al. 2006). In order to provide a snapshot of the type of consumer who decides to visit a winery, the aforementioned tripartite typology devised by Hall (1996) has been incorporated into previous wine tourism research (Hall & Johnson 1998; Christensen et al. 2004) to estimate the proportion of visitors who fall into each of these categories, providing an illustration of exactly who is engaging in wine tourism activities in New Zealand.

One of the main functions of wine tourism is to encourage visitors to purchase wine brands that they may not normally have considered post-visit, and if their winery experience is a positive one, could potentially motivate visitors to make repeat visits to the wineries concerned (Mitchell 2004). Mitchell (2004: 303) found that repeat visitors often exhibited signs of long-term loyalty towards particular wine brands which indicates that “post-visit consumption is part of a longer term relationship with a winery and its wine”. Word-of-mouth, customer satisfaction with both the visit itself and the products consumed coupled with the memory of a positive winery experience “suggests that the majority of visitors have a range of perceptions and attitudes towards the winery that might predispose them to longer-term loyalty” (Mitchell 2004: 303). Purchasing behaviour amongst different market segments has been illustrated by Mitchell (2004) as being different pre-visit, during the visit itself, and post-visit. This was witnessed through “female winery visitors displaying slightly less favourable purchasing behaviour than their male counterparts pre-visit and on site, but representing a more positive prospect post-visit” (Mitchell et al. 2006: 323). As far as establishing whether winery visits play a key role in subsequent purchase behaviour, Mitchell et al. (2006: 323) go on to point out that “existing studies have also not yet established if the winery visit is a catalyst for brand loyalty or whether it simply reinforces the perceptions and behaviours of existing customers”.

3.4 Environmental Issues

Environmental issues such as biosecurity and sustainability are two topics which are of increasing significance for wine tourism research in New Zealand and elsewhere (Hall 2003, 2005, 2006; Mitchell & Hall 2006; Hall et al. 2000; Hall and Mitchell 2008), and from the supply-side perspective this has created a situation within the New Zealand wine industry where innovative responses are required. Literature which notes the variety of industry responses towards supply-side issues in the areas of biosecurity, sustainability and innovation are highlighted in the following section.

3.4.1 Biosecurity

The domain of biosecurity is one where aside from studies by Hall (2003, 2005) and Christensen et al. (2004) there is a noticeable void within New Zealand wine tourism research. Key themes that have emerged within this area for New Zealand wineries concern the level of awareness of potential biosecurity risks, what strategies are in place to deal with any such occurrences, and where wineries are able to turn in order to gain the information that they need to deal with and contain any problems that could potentially arise as a result of a breach of biosecurity protocols. Each of these themes will now be addressed in turn.

3.4.2 Awareness of biosecurity risks

There is a limited awareness of biosecurity risks at the level of the wine tourist who is coming into the country from a foreign destination (Hall 2003), although an awareness of the same risks have been recognised as being important by some industry stakeholders within the wine industry (Hall 2003, 2005; Christensen et al. 2004). Nevertheless, there has only been a limited introduction of biosecurity control strategies at vineyards and wineries in New Zealand (Christensen et al. 2004).

3.4.3 Strategies designed to deal with biosecurity threats

With greater numbers of visitors now setting foot upon New Zealand wineries than ever before, it is of paramount importance to question whether vineyards have effective strategies in place to deal with potential biosecurity threats. Christensen et al. (2004) found that only 11.9 per cent of respondents to the 2003 New Zealand National Wineries' Survey had an active biosecurity strategy in place to deal with a threat should the occasion arise. In light of this problem, the 2010 National Wineries' Survey will revisit this question to see how many wineries now have biosecurity strategies in place, and analyse whether or not this situation has improved since Christensen et al. (2004) conducted their research in this area.

Key themes that have emerged within the area of wine tourism in relation to biosecurity and invasive species concern the level of awareness of potential biosecurity risks, what strategies are in place to deal with any such occurrences, and where wineries are able to turn in order to gain the information required to deal with and contain any problems that could potentially arise as a result of a breach of biosecurity protocols. It has been noted that there is a limited awareness of biosecurity risks at the level of the wine tourist who is coming into the country from a foreign destination (Hall 2003), while an awareness of the same risks have been recognised as being important by those at who are at the stakeholder level within the wine industry (Hall 2005).

3.4.4 Availability of information regarding biosecurity threats

The need to incorporate biosecurity elements into the framework of sustainability programmes in New Zealand has been suggested by Renton et al. (2009) who argue that with the transmission of vectors such as Pierce's disease accessible biosecurity information needs to be granted to winegrowers in order to protect vineyards from disease. Channels through which biosecurity related information is shared and disseminated are important factors in the success of knowledge sharing amongst wineries; the systems of governance required to share knowledge and

preventative strategies regarding biological invasions have been noted by Hall (2010a: 13) as being complex in nature, and this highlights the point that “any consideration of the role of tourism in global environmental change and the relative value of tourism as a contributor to development must consider its role in biological invasions”. Jay and Morad (2006) suggest that such considerations within New Zealand agricultural industries are trapped within preconceived cultural perceptions and the prior socioeconomic experience of benefits and threats, and that these barriers have risen to become the prime determinants of public policy and organisational changes on biosecurity issues, which in turn has affected the readiness of the New Zealand wine industry to respond to external biosecurity threats.

3.5 Sustainability

Although wine, as well as wine regions and businesses, is often promoted in terms of its environmental attributes, the reality is that winegrowing is an industrial process. In many cases winegrowing requires substantial chemical inputs, such as biocides and fertilisers, and is also responsible for emissions, including the transport of wine from vineyard to the retailers – what is sometimes referred to as ‘wine miles’ (Hall & Mitchell 2008). As a result many wineries and wine regions are not only seeking to make their wine production more sustainable but are also looking to use sustainable practices as a point of differentiation in an otherwise congested and highly competitive market.

The concept of sustainability within the context of viticulture and oenology, what are jointly described here as winegrowing, has been defined as “growing and winemaking practices that are sensitive to the environment (environmentally sound), responsive to the needs and interests of society-at-large (socially equitable), and are economically feasible to implement and maintain” (California Sustainable Winegrowing Alliance 2001, cited in Zucca et al. 2009:190). Although designed to promote a unified industry wide benchmark for vineyards, wineries and other wine

businesses to strive to achieve in terms of sustainable practices, the adoption of initiatives such as industry wide sustainability schemes are important as they can be used not only in the promotion wine products, but also of tourism related ventures such as wine regions and wine trails (Kennedy 2009). Yet the development of such ventures is not only dependent on the size and economics of individual wineries, but also depends on the ability of wineries to deal with inherent risks borne from engagement in tourism, such as biosecurity (Hall 2003, 2005) noted above. As a number of vineyards and wine regions have experienced, the introduction and spread of diseases and vectors harmful to viticulture such as phylloxera and Pierce's disease (Hall 2003) could potentially eradicate the work done to encouraging the adoption of sustainable practices and the many innovations that may arise as a direct result of such green entrepreneurship.

3.5.1 Sustainable Winegrowing Initiatives in New Zealand

The evolution of industry focused initiatives to promote sustainable winegrowing within the New Zealand wine industry on a systemic basis began in 1995 with the development of the Sustainable Winegrowing New Zealand (SWNZ) organisation (SWNZ 2010). The SWNZ scheme was first introduced commercially in 1997 with the expectation that it would be adopted by winegrowers from all grape growing regions (SWNZ 2010), and coupled with the introduction of winery standards in 2002 (NZ Wine 2010) aimed to underline an industry-wide commitment to sustainable production practices and techniques. The goal of this initiative was to have full participation in the scheme by all New Zealand winegrowers by 2012, and steps to ensure this have been taken by making SWNZ membership mandatory for all wineries if they wish to take part in trade shows and export their products under the Wine New Zealand banner (SWNZ 2010). Enforcement is also undertaken through external auditing of sustainable practices by SWNZ appointed agents (NZ Wine 2010). It is important to note that although sustainability issues have not previously been explored within the specific context of wine tourism in both New Zealand and overseas research, the lack of this research suggests that a potentially

important area exists which needs to be examined in the future (Gabzdylova et al. 2009; Kennedy 2009).

3.5.2 The adoption of sustainable winegrowing strategies in the New Zealand wine industry

The manifesto of SWNZ aims to provide a best practice model which wineries can utilise to benchmark their environmental practices (SWNZ 2010). These aims seek to provide a greater degree of quality during all stages of production and whilst also recognising that sustainability is also an important issue to the end consumer in whether they choose to buy wine produced in New Zealand (SWNZ 2010).

This manifesto also encompasses five core strategies which are designed to provide benefits to all member of the scheme. These strategies are as follows:

1. Provide a framework for viticultural and winemaking practices that protect the environment while efficiently and economically producing premium wine grapes and wine.
2. Implement a programme of continual improvement to ensure companies operate with a goal of improving their operational practices.
3. Provide a platform for technology transfer so that companies are kept up to date regarding any new technology and its application.
4. Create an external audit structure that has integrity and rigour to comply with market expectations.
5. Give winegrowers the opportunity to be a part of a positive future and met the New Zealand wine industry goal of 100% of grape growers and winemakers operating under approved independently audited sustainability programs.

(NZ Wine 2010)

As membership of the SWNZ scheme is mandatory for all New Zealand wineries (SWNZ 2010), then applying such a framework in a standardised fashion to the New Zealand wine industry

creates the potential for division should wineries choose to reject the aims of the scheme altogether. When consideration is given to fact that the number of vineyards in 2011 exceeds the number of grape growers ((SWNZ 2011) it is pertinent to note that by the year ending June 2009 only 135 wineries, representing 21 per cent of New Zealand wineries (see Table 3.4), had actually become members of the sustainable wine growing scheme, and in 2010 this had only risen by seven percentage points to 28 per cent of all New Zealand wineries (NZ Wine 2010). Commitment to carbon-neutral wine exports remained the focus of only a few, high profile wineries (NZ Wine 2010) so based on this evidence alone it would appear that there are some significant issues at play. Issues surrounding the adoption of sustainable winegrowing are only limited to physical wine production elements; the brand positioning of wine products and important avenues of offshore promotion such as wine tourism are also affected.

Table 3.4. Membership of SWNZ

	2004	2005	2006	2007	2008	2009	2010
Vineyards	403	431	432	457	683	1244	n/a
Number of wineries	463	516	530	543	585	643	672
Wineries	30	51	53	59	77	135	190
% membership	6.5%	9.9%	10%	10.9%	13.2%	21%	28%

Source: NZ Winegrowers 2010

3.5.3 Sustainability from the stakeholders' perspective

The recognition of importance of sustainability issues occurs on multiple levels both internal and external to the winery concerned (Marshall et al. 2005 2010; Gabzdylova et al. 2009). First, stakeholders perceive sustainability as an important source of competitive advantage which can transfer into a positive, environmentally conscious image in the mind of the consumer (Kennedy 2009) resulting in increased sales and brand loyalty (Sen et al. 2006). Second, wine producers face an extremely competitive business environment given a decline in per capita wine consumption, the increased internationalisation of wine sales, and shifts in consumer taste (Hall & Mitchell 2008). For example, in a domestic market of around four million people the Zealand wine industry has become increasingly crowded with 511 wineries registered in *The Australian and New Zealand Wine Directory* in 2009 (Winetitles 2009) as compared to 193 in 1995 (Hall 1996).

3.5.4 Sustainability as a form of competitive advantage

The adoption of sustainable practices has been recognised as a growing trend as a point of differentiation amongst wineries and wine regions (Hall & Mitchell 2008; Flint & Golicic 2009). The way in which the end product reaches consumers has become important when considering environmental issues such as carbon emissions and food miles undertaken in the journey from the vineyard to final consumption (Kennedy 2009). Attracting wine tourism via the promotion of sustainable methods of viticultural production is another path which is being used pursue competitive advantage; this pursuit, although undertaken in the interests of protecting the immediate environment, does not always marry with the political and ecological realities of sustainability at a global scale (Hall 2010b). Therefore, to be truly sustainable wine growing needs to understand the environmental, social and economic effects of both its supply chain and its distribution channels. Nevertheless, the argument that employing sustainability practices can

provide a form of competitive advantage for wineries and wine regions (Hall & Mitchell 2008) has been disputed. For example, Sinha et al. (2010) argue that New Zealand wineries that are committed to an export orientation are more likely to adopt environmental practices, and that it is not institutional pressure that is forcing these organisations to modify their environmental practices. This suggests that environmental protection and conservation practices are potentially an area of some contention within the industry.

3.5.5 The relationship between biosecurity and sustainability in the New Zealand wine industry

The need to incorporate biosecurity elements into the framework of sustainability programmes in New Zealand has been suggested by Renton et al. (2009) who argue that accessible biosecurity information needs to be provided to winegrowers in order to protect vineyards from disease and pests. Exploration of the relationship between biosecurity and sustainable wine tourism in New Zealand was first undertaken by Hall (2003). Key themes that have emerged within the area of wine tourism in relation to biosecurity and invasive species concern the level of awareness of potential biosecurity risks, what strategies are in place to deal with any such occurrences, and where wineries are able to turn in order to gain the information required to deal with and contain any problems that could potentially arise as a result of a breach of biosecurity protocols.

It has been noted that there is a limited awareness of biosecurity risks at the level of the wine tourist who is coming into the country from a foreign destination (Hall 2003), while an awareness of the same risks have been recognised as being important by those at who are at the stakeholder level within the wine industry (Wilkins & Hall 2001; Hall 2005). However, this has tended to be at a perceived as a national level issue rather than one to be dealt with at the vineyard scale.

3.6 Innovation

3.6.1 The relationship between tourism and innovation

Innovation represents for wine tourism an area which could potentially breathe new life into the New Zealand wine industry as it faces turbulent economic times (NZ Wine 2010). However, the very nature of the OECD et al. (2005) definition of innovation (see Chapter 2) suggests a potential dilemma for New Zealand wine tourism. On one hand, you have the approach taken within the SWNZ scheme whereby the sustainable processes methods and products produced must meet a pre-determined criteria dictated by this organisation (SWNZ 2010), while on the other hand there are many wineries which pre-date the introduction of SWNZ in 1995 (SWNZ 2010), and arguably have already created their own innovations within the context of this definition without external intervention. Tourism and innovation policies in New Zealand appear to lack a significant form of inter-relationship as noted by Hall (2009: 15) who points out that “it is possible that one of the reasons for the lack of recognition of tourism in innovation policy is that it is perceived as an industry that is not particularly innovative”. Where there was a connection between tourism and innovation in New Zealand, strong institutional support on a local level was seen to be to the fore (Hall 2009).

3.6.2 Measuring innovation within the New Zealand wine industry context

This is an area where research within the New Zealand wine industry is at a formative point with no prior studies to this authors' knowledge in existence which measure New Zealand wine industry responses to innovation. Applying innovation measures as set out by the OECD et al. (2005) to the New Zealand wine industry provides an opportunity to benchmark attitudes towards innovation within the context of past innovation studies conducted within the New Zealand agricultural sector. Innovations can signal significant changes to existing strategies,

structures and routines (Statistics New Zealand 2007), and as such serve to grow the existing knowledge available for those involved in the supply- side of the industry (Hall & Williams 2008; Hall 2009).

3.7 Cooperative Arrangements

The intensification of the relationship between wine consumption and tourism can be seen to mirror the “development of strong local food identities and sustainable food systems” (Hall et al. 2003: 26) that has occurred in the wake of globalisation. For the purposes of this thesis, cooperative arrangements are defined as those which “mean actively participating with another organisation or individual, in activities for the purpose of innovation” (Statistics New Zealand 2007). New Zealand studies which highlight the benefits of wine tourism networks and clusters point towards just how vital such linkages are for the survival of the wine industry as a whole (Hall & Johnson 1997; Hall et al. 2000; Schrieber 2004; Dana & Winstone 2008; Dana et al. 2011) as they bring together formerly “separate industries with separate business foci” (Hall et al. 2000: 208) and unite vineyards towards the achievement of a common goal, such as the creation of wine trails and attractions. This can serve to promote the unique attributes that provide a valuable point of differentiation for wine regions. Participation in cooperative activities can also serve to strengthen regional links between tourism and agricultural industries, and these have been highlighted as an important source of economic prosperity (Alonso 2010). Thomas (2005) argued that the creation of such economic conditions could be seen as crucial to regions that may have very little else to offer in the form of alternative long-term investment potential.

Cooperative arrangements serve to strengthen relationships and enhance prosperity through encouraging the adoption of innovative techniques and activities. Hall (2005a: 153) writes that “in the knowledge economy it becomes vital that regions, as much as individual firms, attract, retain, and develop the best of their people”. Such arrangements serve to give particular wine

regions a point of difference; one example of cooperative arrangements in action is indicated by Mitchell (2004) who notes that there is a growing adoption of European traditions within the New Zealand wine industry through the development of wine trails and routes, while Hall (2004) points out that the value of social capital and intangible capital in bringing together small businesses which make up wine and food tourism clusters around New Zealand. Hall et al. (2000) contend that at a regional level innovations such as wine trails and routes play a vital role in providing the stimulus for greater network development. Mitchell and van der Linden (2010) also cite the vital role that collaboration plays within New Zealand wine and food tourism networks in terms of adding value and product development.

Cluster development in the Waipara wine region of New Zealand has been the particular focus of research by Dana and Winstone (2008) and Dana et al. (2011) into how degrees of collaboration can actually impede competition amongst cluster members, which is a vital ingredient for industry success. Intense levels of co-operation within New Zealand wine tourism networks are not always guaranteed however. Research into clusters and networks which exist within the Central Otago wine region by Schreiber (2004) found that there were a number of obstacles which served to thwart the growth of horizontal network development between local wine and tourism based businesses; these obstacles included a lack of communication, political issues, and problems surrounding boundary definition between the various sub-sectors which exist within the Central Otago wine region (Schreiber 2004). These issues in turn directly affected the level of co-operation present and impeded the development of a coherent wine tourism network (Hall & Mitchell 2004; Schreiber 2004).

Hall and Mitchell (2004) suggest that there is a need for further research into how the policies and actions passed by government impact on New Zealand based wine clusters and networks, and note that there is an emphasis on regional cluster research in other wine producing nations in Europe, Australia and the United States which New Zealand could benefit from in terms of not

only organisational learning, but also through shared knowledge regarding improved production processes and innovations. Initiatives implemented by traditional Old World wine producers such as Italy and Greece can serve to provide valuable lessons that New World wine producers such as the New Zealand wine industry could potentially gain benefit from introducing, particularly in terms of shared knowledge and techniques (Hall 2005a). It is with this in mind that this thesis includes survey questions designed to ascertain exactly which activities vineyards opted to engage in under a co-operative arrangements and what the motivating factors for such collaborative behaviours are (such as joint marketing, distribution, training and product development). Table 3.5 provides a summary of results from the 1997 and 2003 surveys with respect to cooperation and alliances.

3.8 Alliances

The development of alliances within the New Zealand wine industry has been noted as playing a critical role in improving the flow of information within regional wine networks (Hall & Johnson 1997; Dana and Winstone 2008; Dana et al. 2011). Such networks build on a common goal of creating memorable winery experiences, and this has seen the development of local wine routes in regions of New Zealand such as Central Otago and commercial wine tours which take in several wineries within one journey (Appellation Central 2005). Hall and Johnson (1997) point out that alliances are critical for information sharing as the New Zealand wine industry suffers from gaps within the information exchange process; very success and adoption of such initiatives could well be decided by the quality of information provided to all parties concerned at all levels of the New Zealand wine industry.

Table 3.5: Summary of results from 1997 and 2003 surveys for Networks and Cooperation

Year	Author	Results
1997	Hall and Johnson	<ul style="list-style-type: none"> - There was a lower frequency of producer alliances with tourism organisations than with wine or grape organisations. -Regional business organisations such as the Chambers of Commerce and Business Development Boards were viewed as providing valuable opportunities for business networking and development and regional business promotion. -Wineries had a higher level of involvement with Business Development Boards than the Chamber of Commerce. This was due to the capacity of boards to offer formal advice, most importantly, funding. -Almost one-fifth of respondents were members of a regional tourism organisation with several being engaged in cooperative promotional activities. -The wine industry in 1997 appears to view wine tourism as a regional and not a national issue, yet at a regional level regional tourism organisations do not have a visible presence in the wine industry. -Future strategies to develop wine tourism will require a high level of regional support, yet not all wineries appear to be interested in participating (a particularly interesting fact if you consider this in the context of the current position of some New Zealand winery operators regarding the SWNZ scheme expressed in the 2010 edition of this survey). - The primary responsibility for wine tourism promotion was viewed as being with the wine industry itself.
2003	Christensen et al.	<ul style="list-style-type: none"> -From the limited information available from the 2003 survey in this area, the primary responsibility for wine tourism promotion was viewed as being with regional tourism organisations.

3.8 Tourism and Marketing

3.8.1 Wine and food festivals

Wine and food festivals are playing an increasingly important role in wine tourism, yet New Zealand based research in this area is still in a relatively formative phase when compared to overseas research in this area (Johnson 1997; Hall and Johnson 1998; Mitchell 1999, 2002; Beverland et al. 2001; Mitchell 2002; Christensen et al. 2004; Mitchell et al. 1998, 2001, 2004; Hall & Mitchell, 2001a, 2001 b, 2004, 2005a, 2005b; Hall & Sharples 2008) (Table 3.6). The scenic locations in which many New Zealand Wine and Food Festivals are held coupled with the diverse range of themes on offer provide an important source of motivation for festival attendees to attend on a regular basis (Smith 1992; Mitchell et al. 1998, 2000, 2001; Beverland et al. 2001; Hall et al. 2000; Treavor 2002b; Mitchell 2004; Hall et al. 2003; Hall & Sharples 2008). Empirical evidence which focuses on the catalysts for festival attendance has been researched in studies by Hall and Mitchell (2004, 2005b, 2008). Hall and Mitchell (2008: 209) note that “community wine festivals have increasingly taken on a role as a commoditised product that is externally promoted in order to attract visitors, promote the region or community, or promote consumption of specific wines”. Well over fifty known festivals and industry symposiums are held around New Zealand each year (Winetitles 2009). In the case of New Zealand wine and food festivals, past research has analysed the profiles of attendees (Hall and Mitchell 2004; Mitchell & van der Linden 2010) and focused on festivals as a prime example of special event tourism (Pratt 1994, as cited by Mitchell & Hall 2006). Previous National Winery Surveys (Hall and Johnson 1997; Christensen et al. 2004) have focused on the number of events attended by local wine producers, and this will provide a basis for comparison in the proposed survey to see if there has been an increase in festival and symposium involvement within the New Zealand wine industry.

Table 3.6: Summary of results from 1997 and 2003 surveys for Tourism and Marketing

Year	Author	Results
1997	Hall and Johnson	<ul style="list-style-type: none"> -Tourists are valuable -Tourism provides significant marketing opportunities - 72.9 per cent of winery owners agree that time spent with their visitors is valuable. - 21.7 per cent of respondents agreed with the statement that tourism did not attract the kind of visitors they wanted to their winery. - Most producers (63 per cent) had attended no more than one wine festival in 1997, a third (35 per cent) attended between two and six festivals, and only a very few (2 per cent) attended more than six festivals.
2003	Christensen et al.	<ul style="list-style-type: none"> - Wine tourism is seen as important in terms of enhancing product/brand awareness, helping to differentiate one wineries wine from another, helping to develop mail order sales and (2003 survey only), helping to educate customers. - Tourists are valuable - there is an increase of 13.5 percentage points in those either agreeing or strongly agreeing with this statement. - There is an increase in the recognition that tourism provides significant marketing opportunities. - There is an increase in the belief that the positives outweigh the negatives when it comes to wine tourism. - Tourism does not attract the kind of visitors I want to my winery –2003 has seen this fall 8.4 percentage points to 13.3 per cent. - Wine tourism is now looked on even more positively than it was in 1997.

3.8.2 Regional tourism promotion

The intersection of wine tourism and regional development studies is a burgeoning area of research in New Zealand (Hall 1996, 2002, 2003a, 2004, 2005a; Hall et al. 2000; Hall & Mitchell, 2000, 2002a). Hall (1996: 114) points towards the importance of studying relationships which exist between “wine and destination region promotion and the accompanying set of economic and social linkages” which branch out from this intersect. Such linkages are vital to promote economic growth and rejuvenate and conserve rural areas which may have previously been mired in financial decline (Hall et al. 2000). Mitchell and Hall (2006: 315) indicate that the increase in employment opportunities and revenue generated from the sale of wine tourism merchandise that results from this growth combine with the “more tangible benefits, elements of the winescape, including vineyards, wineries and wine itself, [which] are important components of regional promotion for both investment and tourism”.

Hall et al. (1997) assert that regional branding in New Zealand suffers from an absence of standardisation across wineries, with less than a third of the wineries surveyed as part of the first National Wineries’ Survey (Hall et al. 1997) having promotional material or merchandise that featured a form of regional branding. Wine trade shows and exhibition have also been found to have significant impact in terms of wine tourism promotion (Mitchell, 2004); analysis of the role that these events can play in influencing “wider consumer behaviour and visitation patterns” (Mitchell et al. 2004: 315) has been identified as an area which requires further research (Mitchell et al. 2004).

3.9 Chapter Summary

As this chapter has identified, there are some significant knowledge gaps which exist within the present body of New Zealand wine tourism research. Further research is needed in order to clearly define what destination attributes the typical wine tourist finds attractive for an enjoyable winery experiences could also aid the future business strategies for New Zealand wineries who engage in wine tourism. Further research opportunities exist in terms of surveying wine tourists at the cellar door to ascertain exactly what motivates visitation, while significant issues also exist concerning biosecurity, sustainability and innovation and their relationship with dimensions of wine tourism.

Regionality has also been seen as an important driver of wine tourism in New Zealand, especially in terms of promotion and destination attractiveness. While this particular survey set out to give a broad base of results throughout the survey time series, there are gaps in some of the regional coverage received in past and present editions of this survey, most notably from those wineries located in the Gisborne region. With this in mind, this study will now turn to the subsequent chapters which discuss the methodology which was utilised in this survey before revealing and discussing the results.

Chapter 4

Methodology

4.1 Method

The 2010 New Zealand National Wineries' Survey was designed to facilitate the collection of information about wineries' attitudes towards and perceptions of wine tourism in New Zealand. The sample population was derived from all New Zealand wineries registered in *The 2009 Australian and New Zealand Wine Industry Directory* (Winetitles 2009) and it was the third such survey of its type to be undertaken (Hall & Johnson 1997; Christensen et al. 2004). This thesis as part therefore further extends a longitudinal time series survey of New Zealand wine tourism (Hall & Johnson 1997; Christensen et al. 2004). So far as can be ascertained this is the first time such longitudinal research has been carried out on wine tourism within the New Zealand wine industry or internationally. Although many tourism researchers emphasise the value of longitudinal research (e.g. Getz 1994; Tassiopoulos et al. 2004; Burgess et al. 2005), it is often not conducted. Therefore, being able to compare the findings of this study with previous New Zealand National Wineries' Surveys (Hall & Johnson, 1997; Christensen et al., 2004) is of real value for gaining an understanding of the changing dimensions of wine tourism in New Zealand.

This chapter discusses the survey design that was employed, how the source data for this research was obtained, the procedures that were utilised, and the ethical considerations that were required to be taken into account before this particular study was undertaken.

4.1.1 Survey Design

The survey used in this thesis (refer Appendix A) was based on the template of the two previous New Zealand National Wineries' Surveys (Hall & Johnson 1997; Christensen et al. 2004). A copy of the 2003 survey can be viewed by referring to Appendix B. Unfortunately a physical copy of the 1997 survey was no longer in existence so was unable to be included with this study. The initial survey questions (Hall & Johnson 1997) were created by the researchers involved, and also utilised questions posed in previous New Zealand (e.g., Reid 1990), and international studies (e.g., Golledge & Maddern 1994; Dodd and Bigotte 1995; Maddern and Golledge 1996; Macionis 1997). A question regarding biosecurity was added to the second New Zealand National Wineries' Survey (Christensen et al. 2004). This has been expanded into a series of questions that make up a section dedicated solely to biosecurity issues in the present study. The determination of the current New Zealand wine industry stance towards sustainable practices as a form of innovation was also introduced as a new section in this survey. This section utilised the OECD et al. (2005) innovation survey framework as a basis for the questions. In addition, questions based on those in the *Innovation in New Zealand* survey (Statistics New Zealand 2007) were used in order to benchmark the level of innovation in the wine industry with the New Zealand agricultural sector as well as with the overall national levels of innovation.

The 2010 New Zealand National Wineries' Survey was divided into seven main sections. The first two sections focused on winery and visitor profiles. This was then followed by sections dedicated to biosecurity and sustainability, before innovation in the New Zealand wine tourism industry was examined. The final section which focused on tourism and marketing then led into a set of questions that were designed to gather respondent contact information. Questions in the 2010 survey were therefore similar to those asked in the 1997 and 2003 surveys with some

modifications designed to gather updated information regarding biosecurity, innovation and sustainability issues. Further changes were also made based on the results of previous New Zealand wine tourism research (Hall & Johnson 1998; Hall et al. 2000; Mitchell & Hall 2001a, 2001b; Christensen et al. 2004).

Exploration of the relationship between biosecurity and wine tourism in New Zealand was first undertaken by Hall (2003), and questions posed in the biosecurity component of the 2010 New Zealand Wineries Survey were based on the findings that this particular study provided. Supply-side perspectives were gained through asking winemakers six questions. First, winemakers were asked whether their vineyard had biosecurity measures in place with respect to wine tourists. Second, it was ascertained as to whether wine tourists were allowed to wander freely amongst the vines when visiting. Governance issues which were highlighted by Hall (2003) were then addressed by asking winemakers whether or not they believed that their winery currently received adequate information regarding biosecurity threats from Government agencies. Industry readiness to deal with biosecurity threats was also gauged by asking respondents whether they felt that their winery currently has an effective strategy in place to deal with potential biosecurity threats. The incorporation of a biosecurity component as part of the overall vision for a wider institutionalised sustainability programme was a key area within this survey due to the lack of research which presently exists within this area.

The first completely new section to be featured in the 2010 survey asked participants a series of questions related to sustainability practices. The first set of questions in this section employed a five point Likert scale (1= Strongly disagree, 5= Strongly agree) and asked how important participants believed sustainability practices were for the New Zealand wine industry, and whether any sustainability practices utilised onsite provided their winery with an important

source of competitive advantage. Participants were then asked what the reasons were for the sustainability practices that they had chosen to employ. Nine options were presented; to increase revenue, to reduce costs, to increase market share, to reduce energy consumption or to reduce environmental impact. Also included in the options listed were to establish and/or exploit market opportunities, to improve productivity or to attract visitors to their particular winery. A final option was provided where participants could list any other reasons which fell outside these options. Further questions were added to determine what type of relationship winegrowers had with SWNZ, and also asked whether participants thought that biosecurity should be part of the overall SWNZ scheme.

An additional new feature to this third edition of the survey was a set of questions regarding innovation in terms of changes to goods and services, production and operational methods that were adapted from the *Innovation in New Zealand* study (Statistics New Zealand, 2007) which contained questions based on innovation measures set by the OECD et al. (2005). Participants were asked what the reasons were for the sustainability practices that they had chosen to employ. Nine options were presented in the same fashion as they had in the previous section regarding sustainability. Applying these innovation measures as set out by the OECD et al. (2005) framework to the New Zealand wine industry provided an opportunity to benchmark attitudes towards innovation and provided the basis for comparison with past innovation studies conducted within the New Zealand agricultural sector towards sustainable practices.

4.1.2 Source data

The 2010 survey utilised primary data obtained from participants who represent each of the 511 vineyards located within New Zealand as per publically available winery listings published in *The 2009 Australian and New Zealand Wine Industry Directory* (Winetitles 2009) who initially received the survey via email (491 wineries) or by post (20 wineries). It was originally envisaged that conducting the survey by email for a majority of the participants would yield a greater response rate than previous New Zealand National Wineries' Surveys had been able to obtain. However, this particular approach to data collection yielded an unsatisfactory response rate initially (43 responses) as respondents appeared unwilling to provide industry sensitive information via an online survey. A postal mail out to all wineries who had not yet responded to the online survey was therefore conducted, and this yielded a far more successful response rate; a further 82 wineries responded, which raised the overall response rate to 125 wineries (25 per cent) in total. Of these 125 wineries, 22 responded that they had in fact recently gone out of business since the publication of *The 2009 Australian and New Zealand Wine Industry Directory* (Winetitles, 2009) but as these were still judged as valid responses, these surveys were still included in the overall response rate. The remaining 103 wineries who responded then provided the data that this study was based upon.

With respect to prior response rates the 1997 survey obtained 111 responses out of 270 producers, giving a response rate of 41.1 per cent (Hall & Johnson 1997), whilst the second survey conducted in 2003 achieved a response rate of 121 usable responses out of the 419 wineries surveyed, resulting in a response rate of 28.9 per cent (Christensen et al. 2004). The response rate of the present survey compares very favourably to the 5.5 per cent response rate

(32 survey participants) to the Vintage 2009 annual wine industry benchmarking survey (Deliottes 2010).

4.1.3 Procedure

Once the completed surveys were returned via email or post to the University of Canterbury, the results were entered into the SPSS software programme. This not only enabled analysis of the data that has been received, but also allowed for a comparative analysis to be undertaken where possible using data obtained by Christensen et al. (2004) in the 2003 New Zealand National Wineries' Survey for which the SPSS files were available. Data was crosstabulated using SPSS and the findings were then written up.

4.2 Ethical Considerations

This was the third survey undertaken in a series of New Zealand National Wineries' Surveys (past surveys have been conducted in 1996/7 and 2003/4), and previous ethics approval as a low risk research application had been received from the Department of Tourism at the University of Otago (1996, 2003) and the Tourism Programme at Victoria University (1996). The main differences in the 2010 survey from the two previous surveys occurred with the introduction of new questions within the biosecurity and sustainability sections, and the introduction of a section dedicated specifically to innovation within the New Zealand wine industry.

Information was gathered only from those wineries who wished to participate in this survey. All responses were treated in the strictest confidence, and respondents were informed that any results published would be in aggregate form only to ensure the privacy and protection of all respondents, both individually and within a particular region. Respondents who wished to receive a copy of the findings were required to provide their name and address, and these results

were then sent upon completion of this research. A copy of the low risk research ethics application approval for this thesis is included in the Appendices section of this thesis (refer to Appendix D).

4.3 Chapter Summary

This chapter has outlined the methodology which was used in this study. Although a number of questions asked in previous wine tourism surveys have been retained, new questions have been asked with respect to biosecurity, innovation and sustainability. As far as can be ascertained this is the first New Zealand or international study to provide such an extensive longitudinal analysis of wine tourism at a national scale. This thesis will now move to reveal the findings of this study, and discuss what these results imply for the New Zealand wine industry as a whole.

Chapter 5

Findings and Discussion

This chapter will highlight and discuss the findings of the 2010 New Zealand National Wineries' Survey and compare these results with the available data sourced from the two previous surveys that were conducted in 1997 and 2003 (Hall & Johnson 1998; Christensen et al. 1994). The chapter is set out under the same headings as the survey itself, and is divided into seven sections that cover the areas of winery profile, visitor profile, environmental issues, innovation, networks, cooperation, and tourism and marketing.

5.1 Winery Profile

5.1.1 Location

Marlborough, Central Otago and the Wairarapa/Martinborough regions returned the most responses, with 22, 20 and 13 respectively. This marks a change from the 2003 survey where the Hawke's Bay region returned the most responses (25) followed by Marlborough (24) and Central Otago (16). The lowest response rates of only one survey returned each were received from the Gisborne and the Waikato regions, which is a similar scenario to that which occurred in 2003 and 1997. Wineries from all New Zealand wine regions returned responses to the 2010 survey.

5.1.2 Winery Age

Respondents to the 2010 survey reported that the earliest planting of grapes was in 1851, and the first commercial release of wine was reported to be in 1870.

5.1.2.1 First commercial release of wine amongst respondents

Out of those who responded to the 2010 survey the earliest year that an individual winery in this survey had first opened to the public was in 1896. When comparing results across the survey time series of when individual wineries had first opened to the public, in 1997 41.1 per cent of respondents stated that they first opened up their winery to the public in the four years preceding this particular survey, while in the 2003 survey 12.5 per cent responded that they had first opened their winery to the public in 2000. This 2003 figure rose by 18.6 percentage points in 2010 where it was indicated that 31.1 per cent had opened their winery within the four years previous to the 2010 survey. Also of note in the 2010 survey is that 2006 was reported to be the year when the highest number (14.6 per cent) of wineries reported commercially releasing their wine in a single year, but this figure decreases significantly to 5.8 per cent by the year 2008.

5.1.3 Employees

The average number of full time, part-time and casual employees varied greatly as indicated by Table 5.1. This variation is a similar situation to the 2003 survey, however the main difference to note is a sharp decline in the both the average number of casual employees from 18 in 2003 to nine in 2010, while the average number of full time employees rose by five employees from 2003 (this was stated as 13 employees in the 2010 survey, as opposed to eight in 2003). The data available from the 1997 survey indicated that most producers were reported as employing six or less full time employees.

The decline in staffing levels in the 2010 survey from those exhibited in 1997 and 2003 indicates potential issues for New Zealand wine tourism. The main issue is that this suggests that an increase in visitor numbers could compromise the ability of wineries to deliver a cellar door experience which is both intimate and allows for direct contact with the winemaker (Hall & Johnson 1998; Frochot 2000, 2003; Christensen et al. 2004). This situation in turn could cause

another issue in that this could impact on the level of cellar door sales that are made as customers experience less engagement with the wine tourism experience. Cellar door sales are noted as important for smaller boutique wineries (Barker et al. 2001; Getz & Brown 2006; Mitchell & Hall 2006; Cohen & Ben-Nun 2009). However, larger operations with a higher number of employees can afford to be somewhat ambivalent towards cellar door sales as a source of revenue (Hall 1996).

Table 5.1: Average number of employees

Employment basis	1997	2003	2010
Full time employees	6	8	13
Part-time employees	n/a	5	3
Casual employees	n/a	18	9

5.1.4 Production levels

Production levels also showed a great deal of variation, with a minimum of 200 and a maximum of four million litres being stated by those surveyed in 2010. Median production for 2010 was 30,000 litres, with a mean of 250,070 litres. This was a notable increase on the 2003 figures, where a maximum of 1,400,000 litres was reported, and the mean production level was 120,934 litres. This finding also reflects the overall increase in New Zealand wine production over this period which went from 89 million litres produced in 2003 to 190 million litres in 2010 (NZ Wine 2010).

5.1.5 Location of wine production

66 per cent of respondents stated that their wine was made on site, which is a similar scenario to what was reported in 2003 of 67.2 per cent (Christensen et al. 2004).

5.1.6 Ownership status

The ownership status of wineries indicated a significant rise in the number of partnerships reported (37.9 per cent compared with just 12.6 per cent in 2003). 34 per cent indicated that they were of private company status, which was a sharp decline from the 62.2 per cent reported in 2003. 12.6 per cent reported that they were sole proprietors (down slightly from 14.3 per cent in 2003) while 2.9 per cent of respondents in the 2010 survey who chose the 'Other' category described the ownership status of their winery as a joint venture. In 1997 it was noted that 92 per cent of New Zealand wineries were privately owned, while the remaining eight per cent were public companies, trusts or owned by universities.

The rise in the number of partnerships and development of joint ventures within the New Zealand wine industry in the 2010 survey suggests that, due to general economic circumstances and increased costs of wine production, owners have elected to combine resources. This arguably goes against the trend of complacency within the industry with respect to business relationships and structures suggested by Simpson and Bretherton (2004). Resource levels available may also affect business and wine tourism strategies (Beverland et al. 2000), and this increase in the sharing of resources could potentially aid in recognising opportunities in areas which may have otherwise been neglected prior to the development of partnership arrangements (Alonso & Northcote 2010).

5.1.7 Turnover

Income in excess of \$NZ 750,000 was reported by 38.8 per cent of respondents over the 2009 tax year from the sales of all products and services (this category had risen from the 28.3 per cent reported in 2003), while 13.6 per cent indicated that their annual turnover was less than \$NZ 50,000 (down from 20.4 per cent in 2003). 10.7 per cent preferred not to state their income levels in the 2010 survey. In 1997, 51.6 per cent of wineries reported that they earned less than \$NZ

250,000 annually, while 25 per cent earned over \$NZ 750,000 and 14.4 per cent earned less than \$NZ 50,000. The rise in numbers between 1997 and 2010 in the \$NZ 750,000 category is not a cause for celebration however; this is down to there being more wineries in the market in 2010, and not a sign of increasing industry affluence.

5.1.8 Distribution of sales

5.1.8.1 Distribution of wine sales

When respondents were asked how wine sales figures were distributed (Table 5.2), the category “Other domestic wine sales” ranked the highest in 2010 with 36 per cent, followed by exports of wine at with 33 per cent. Cellar door sales accounted for 14.2 per cent of sales, while Internet orders accounted for 3.8 per cent, and postal mail order sales for 6.1 per cent. Accommodation was ranked last with just one per cent of reported sales, while other products and services contributed 6.1 per cent. From the previous survey data available, in 1997 it was noted that domestic wine sales accounted for 46 per cent of sales, while cellar door wine sales were reported at 20 per cent. When compared with the 2003 and 2010 figures this situation indicates that there is a steady decline in other domestic wine sales, while the decline in cellar door sales appears to have slowed from that observed in the 2003 study when this category went from 20 per cent in 1997 to 14.9 per cent (a drop of 5.1 percentage points). Also of importance to note here is that Internet order sales in 2010 (3.8 per cent) appear to have reduced the number of postal order sales (8.33 per cent in 2003) which was reported as having dropped to 6.1 per cent in 2010.

The rate at which the decline in cellar door sales has slowed indicates that there is some credence being given amongst winery owners towards the value of direct contact with the customer at the cellar door (Charters & O’Neill 2001; Batra 2008). This shift in the public relations focus of wineries underlines that there appears to be some recognition of the fact that there needs to be

ongoing reinforcement of the relationship between wineries and wine tourists (Mitchell & Hall 2006; Barber et al. 2008; Alonso & O’Neil 2009) through direct forms of communication such as websites and mailing lists (Hall & Johnson 1998; Christensen et al. 2004) in order to promote winery products and increase sales revenue.

Table 5.2: Distribution of wine sales

Category	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Other domestic wine sales	48	46.0%	47	38.7%	37	36.0%
Export wine sales	n/a	n/a	38	31.2%	34	33.0%
Cellar door wine sales	21	20.0%	18	14.9%	15	14.2%
Internet order wine sales	n/a	n/a	n/a	n/a	4	3.8%
Postal mail order wine sales	n/a	n/a	10	8.3%	6	6.1%
Accommodation	n/a	n/a	2	1.4%	1	1.0%
Other products and services	n/a	n/a	7	6.2%	6	6.1%

5.1.8.2 Distribution of domestic wine sales

The category ‘Other domestic wine sales’ was broken down into the proportion of sales that occurred through local channels (Table 5.3). This was reported in 2010 as consisting of 15.9 per cent of sales occurring in supermarkets, 27.3 per cent in specialist wine stores, 1.9 per cent through wine clubs, and 36.3 per cent in restaurants. Farmers’ markets accounted for 1.8 per cent of domestic wine sales, while other outlets made up the remaining four per cent of domestic wine sales. Compared with the 2003 survey, this response indicated that there was a marked decline in sales through specialist wine stores (this figure was reported as 40.3 per cent in 2003, but in 2010 was reported as 27.3 per cent). Sales through supermarket chains (15.9 per cent) remained similar in 2010 (in 2003 this was reported as representing 15.6 per cent of domestic wine sales).

Farmers' markets and restaurants (0.1 per cent and 29.6 per cent respectively in the 2003 survey) both showed signs of growth in the 2010 results. No data for this question was available from the 1997 survey.

The decline in sales at specialist wine stores and the relatively low level of sales which are shown as occurring throughout supermarket chains in 2010 suggest a move away by some wineries from selling through these distribution channels due to the cost margins involved (Charters & O'Neill 2001), and indicates that there could be potential opportunities for wineries due to the lack of these marginal costs through direct sales to wine tourists at the cellar door if wineries choose to recognise the importance of this particular point of sale.

Table 5.3: Distribution of domestic wine sales

Category	2003	2010
Supermarkets	15.6%	15.9%
Specialist wine stores	40.3%	27.3%
Restaurants	29.6%	36.3%
Wine clubs	2.1%	1.9%
Farmers' markets	0.1%	1.8%
Other outlets	6.5%	4.0%

5.1.9 Cellar door sales

5.1.9.1 Number of wineries who offer cellar door sales

Table 5.4 shows that 68 per cent of wineries offered cellar door sales in 2010, which was a slight increase of 1.6 percentage points on 2003 when 66.4 per cent responded positively to this question. However, compared with the 1997 figures (83 per cent) there is a decrease in the

overall number of wineries offering cellar door sales by 15 per cent which could possibly be explained by some businesses having run their course over this fifteen year period.

Table 5.4: Number of wineries which offer cellar door sales

	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Offer	92	83%	80	66.4%	70	68%
Do not offer	19	17%	41	33.6%	33	32%
Total	111	100%	121	100.0	103	100.0

5.1.9.2 Significant characteristics for cellar door sales

In order to ascertain whether there were particular characteristics which defined those wineries which offered cellar door sales, from the data available the 2010 survey (Table 5.5) the results showed that the characteristics which are significant at the .05 level for wineries where cellar door sales were offered are the age of winery (Sig. = .002) and the ownership status (Sig. = .035). Of particular interest here is that winery size was not a significant characteristic.

Table 5.5: Characteristics that define whether cellar door sales are offered

Characteristic	F	Sig.
Region	.1456	.150
Age of winery	2.308	.002
Year wine was commercially released	1.884	.110
Year winery was first opened	1.425	.116
Winery Size	1.360	.150
Wine is made on site	2.874	.093
Ownership status	2.507	.035
Annual turnover	.998	.431

Significance level is measured at .05.

5.1.9.3 Cellar door sales importance to business

Based solely on those who responded to this statement with either extremely important or very important (Table 5.6), there was a decline in 2010 of 8.7 percentage points from 65.9 per cent

reported in 2003 to 57.2 per cent when wineries were asked whether cellar door sales were important for their business. In the 1997 survey, 75 per cent of businesses stated that cellar door sales were important. These figures show that the opportunities presented by cellar door sales appear to be viewed by those within the industry with a degree of skepticism. Given the current predicament in terms of oversupply in the New Zealand wine industry (Deloitte 2010), it would be reasonable to expect that opportunities presented by direct points of sale would be of increased importance. This suggests that an area which requires substantial further research exists, that builds on past surveys at the cellar door (Getz & Brown 2006; Mitchell & Hall 2006; Cohen & Ben-Nun 2009), that examines why the opportunities offered by cellar door sales appear to be undervalued by New Zealand winery operators.

Table 5.6: Cellar door sales importance to business

Statement	Yes	# 1997	% 1997	Yes	# 2003	% 2003	Yes	# 2010	% 2010
Cellar door sales are important my business	78	104	75.0%	54	82	65.9%	59	103	57.2%

5.1.9.4 Intention to offer cellar door sales in the future

Only 14.6 per cent of respondents indicated that they were intending to offer cellar door sales in the future (Table 5.7), and this was down by 23.2 percentage points from 37.8 per cent reported in 2003. In 1997 41 per cent intended to offer cellar door sales in the future and 18 per cent did not, while 41 per cent stated that they already offered cellar door sales. 66 per cent of those surveyed in 2010 replied that they already offered cellar door sales. These figures suggest that wine tourism in New Zealand has reached an increasingly mature stage in its life course.

Table 5.7: Intention to offer cellar door sales in the future

	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Yes	7	41.0%	14	37.8%	15	14.6%
No	3	18.0%	23	62.2%	20	19.4%
Already offer cellar door sales	7	41.0%	-	-	68	66.0%
Total	17	100.0%	37	100.0%	103	100.0%

5.1.10 Tasting fees

5.1.10.1 Tasting fee charges

In terms of tasting fees (Table 5.8), 74.8 per cent indicated that they did not charge tasting fees, which is an increase from the figure of 65.6 per cent reported in 2003. In 1997 it was reported that just over half (52 per cent) of respondents charged tasting fees which most commonly cost \$NZ two per head, and out of those producers who charged a tasting fee, all charged tasters in groups. Of those who charged tasting fees in the 2010 survey (25.2 per cent), the highest amount that was reported to be charged was \$NZ eight, and the most common amount charged per head was \$NZ five (9.7 per cent reported this). If a winery did charge tasting fees, then a full refund upon purchase was offered by 70.9 per cent of respondents and a partial refund was offered to visitors by 6.8 per cent. In the 1997 survey, a full refund was offered by 48 per cent and a partial refund was offered by none of the respondents. The 2003 survey results stated that a full refund was offered by 63.2 per cent, while a partial refund was offered by 13.2 per cent.

This pattern of decline in tasting room charges across the survey time series demonstrates that New Zealand winery operators clearly feel that charging a tasting room fee could impact on long-term customer loyalty (Treloar et al. 2008). Although operating a tasting room may carry a financial burden on the winery (Charters et al. 2009), the need to encourage wine tourists to consume the products on offer is of paramount importance to the majority of wineries, eager to

take advantage of what Bruwer et al. (2012: 57) describe as the “multiplier effect” which has been noted to exist in post-visit behaviour (Bruwer et al. 2012). Allowing visitors to feel welcome in the tasting room environment serves important functions in terms of encouraging repeat visitation (Madonna 1999) and allowing customers to overcome their reluctance to purchasing unknown brands (Dodd 1995). Setting a non-refundable tasting fee could serve to ruin this element of the winery experience, which makes it interesting to note that the majority of wineries in 2010 who charge a tasting fee offer a full refund in order to create a positive experience for wine tourists.

Table 5.8: Winery charges tasting fees

	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Yes	53	51.0%	41	34.4%	26	25.2%
No	51	49.0%	79	65.6%	77	74.8%
Total	104	100%	121	100.0%	103	100.0%

5.1.10.2 Availability

5.1.10.2.1 Wine availability to local consumers

87.4 per cent of respondents to the 2010 survey stated that their wines were available locally (Table 5.9). In 1997, 93.6 per cent stated that their wine was available locally, while in 2003 this figure was stated as 91.9 per cent, and in 1997 was recorded as at 97 per cent. The 2010 results denote a drop of 4.5 percentage points in regards to this question from 2003.

Table 5.9: Wines are available locally (apart from cellar door sales)

	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Yes	93	97.0%	111	91.9%	90	87.4%
No	11	3.0%	10	8.1%	13	12.6%
Total	104	100.0%	121	100.0%	103	100.0%

5.1.10.2.2 Place of purchase for locally available wines

Table 5.10 shows that in the 2010 survey cafes and restaurants remained the main place where respondents' wines were locally available (recording 81.5 per cent in 2010, 93.1 per cent in 2003 and 95 per cent in 1997). In the 2010 survey specialist wine stores ranked second (68.9 per cent), which was also the same situation in 2003 (88.2 per cent). The availability of wines in pubs, taverns and wine bars ranked third in 2010 (48.5 per cent) which was a rise of 8.5 percentage points from 2003 when this figure was reported as being 40 per cent, down from (as 64 per cent in 1997). Supermarkets, which were previously ranked third in 2003 on 59.8 per cent, dropped 19 percentage points to fourth in the 2010 survey with 40.8 per cent of purchases being made there. This could be due to the margins charged (Charters & O'Neill 2001) by supermarkets on wine products which have discouraged some wineries from stocking their products.

Table 5.10: Places where wines produced can be purchased from if available locally

	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Cafes or restaurants	98	95.0%	112	93.1%	84	81.5%
Pubs, taverns or wine bars	67	64.0%	49	40.0%	50	48.5%
Supermarkets	n/a	n/a	72	59.8%	42	40.8%
Specialist wine stores	n/a	n/a	107	88.2%	71	68.9%
Accommodation houses	54	52.0%	39	32.4%	26	25.2%
Other outlets*	n/a	n/a	5	4.0%	3	2.9%

*The only other outlets cited by respondents in the 2010 survey were Farmers' Markets.

5.1.11 Products, services and facilities

5.1.11.1 Products

From the range of products offered (Table 5.11), company branded merchandise was the most commonly offered product in 1997, 2003 and 2010, with 66 per cent, 71.3 per cent and 46.6 per cent of responses respectively. Company branded promotional material was the second most cited product offered in 2010 (33 per cent), while regional merchandise ranked third (23.3 per

cent). This is similar to 2003, when company branded promotional material ranked second (55 per cent), while that was promotional material that was neither company branded nor regionally focused ranked third (53.8 per cent). Other wine merchandise noted by as being offered by respondents in the 2010 survey (4.9 per cent) included glasses, decanters, wineskin and wine-related books.

The desire to promote memories of the post-visit experience (Barber et al. 2008) amongst wine tourists is obviously an integral part of the promotional strategy of many New Zealand wineries with the importance placed on company branded promotional material and regional merchandising. While also providing a revenue stream for wineries (Dodd 1995; Dodd & Bigotte 1997; Dodd & Gustafson 1997; Jarvis 2002a, 2002b; Jarvis & Hoffman 2002; Barber et al. 2008), products purchased are important for reinforcing the attributes of a particular region (Barber et al. 2008) and raising the chances of repeat visitation (Madonna 1999), and it would appear that this advice is being adhered to by New Zealand wineries.

Table 5.11: Types of products offered

Type of product	# 1997	% 1997	# 2003	% 2003	# 2010	% 2010
Company branded merchandise	69	66.0%	86	71.3%	48	46.6%
Regional merchandise	28	27.0%	16	13.8%	24	23.3%
Regional promotional material	28	27.0%	16	13.8%	22	21.4%
Promotional material	n/a	n/a	65	53.8%	34	33%
Company branded promotional material	68	65.5%	66	55%	32	31.1%
Other wine merchandise	36	35.0%	21	17.5%	5	4.9%

5.1.10.2 Services and food

Table 5.12 compares what services were provided by respondents. In 2010, the most provided services on offer were winery tours (67 per cent) followed by wine tasting (59.4 per cent). Hosting functions ranked third (51.1 per cent), while of note here was the rise in the provision of

restaurants which ranked fourth (50 per cent) up from sixth position in 2003. Compared to the 2003 survey the top two ranked services provided changed position (in 2003 wine tasting ranked first, while winery tours ranked in second place). In the 1997 survey wine tasting was stated as the most commonly offered service (97 per cent) followed by winery tours (57 per cent) and vineyard tours (44 per cent).

Providing wine tourists with a unique experience through differentiation based on services offered (Dodd & Gustafson 1997; Charters & O'Neill 2000, 2001; O'Neill & Charters 1999, 2000; Telfer 2001a; O'Neill & Palmer 2004; Pan et al. 2008) and overall service quality has risen in importance in the New Zealand wine industry over the seven years since the 2003 survey was conducted. The increase in the number of restaurants in the 2010 survey reflects that food has also become a real drawcard in tandem with the wine tourism experience. The educational aspects that can be emphasised through providing services such as winery tours and wine tasting (Kendziorek 1994a, b, c, d; Charters & O'Neill 2000, 2001; Dodd & Beverland 2001; O'Neill & Charters 1999, 2000; Pan et al. 2008; Lockshin & Knott 2009) have also become increasingly prominent as New Zealand wineries seek to engage with their visitors through service quality.

5.1.11.3 Facilities

The top rankings in the 2010 survey for facilities (Table 5.13) were noted as being in the 'Other' category (34.5 per cent), followed by barrel halls (19.6 per cent). Wine caves and picnic and entertainment areas ranked third equal (both at 18.4 per cent). Responses to the 'Other' category cited restaurant facilities, concert facilities, art galleries and cycle tracks as being facilities that were also provided onsite. In contrast to these rankings, the 2003 survey ranked the most provided facilities as being picnic and entertainment areas (56.3 per cent), followed by barrel halls (43.8 per cent) and conference facilities (28.1 per cent), while in 1997 picnic and entertainment areas ranked first (53 per cent) with barbecue areas in second place (29 per cent) and barrel halls in third position (28 per cent).

Expanding the range of facilities on offer has become another important point of differentiation between New Zealand wineries in 2010, and is a sign based on the facilities cited by those who responded to the 'Other' category that these points of difference are being used to motivate winery visitation (Getz 2000; Lang Research 2001; Brown & Getz 2005; Schiefer & Fischer 2008; Brown & Smith 2010). By meeting and going beyond the expectations of visitors, it is clear that some wineries are wishing to build on the number of repeat visitors (Charters & O'Neill 2001) and consequently boost direct sales of wine at the cellar door (Dodd 1995; King & Morris 1997b; Hills 1998; Travers 1999; O'Neill, Palmer, & Charters 2002; Alonso et al. 2008; Vlachvei & Notta 2009; Bruwer et al. 2012).

Table 5.12: Services and food

Service	# 1997	% 1997	Ranking 1997	# 2003	% 2003	Ranking 2003	# 2010	% 2010	Ranking 2010
Wine tasting	97	93.0%	1	72	91.1 %	1	47	59.4%	2
Winery tours	59	57.0%	2	40	50.6%	2	65	67.0%	1
Tasting or snack food	22	21.0%	6	32	40.5%	3 =	19	39.5%	6
Events/festivals	-	-	-	32	40.5%	3 =	15	46.9%	5
Vineyard tours	46	44.0%	3	31	39.2%	4	32	37.2%	7
Host functions	27	26.0%	5	30	38.0%	5	22	51.1%	3
Restaurant	33	32.0%	4	20	25.3%	6	19	50.0%	4
Host Conferences	11	11.0%	8	18	22.8%	7	11	30.6%	9
Accommodation	7	7.0%	10	12	15.2%	8	10	35.7%	8
Entertainment	20	20.0%	7	6	7.6%	9	7	26.9%	10
Other services or food services	8	8.0%	9	3	3.8%	10	6	24.0%	11

Table 5.13: Facilities

Facilities	# 1997	% 1997	Ranking 1997	# 2003	% 2003	Ranking 2003	# 2010	% 2010	Ranking 2010
Picnic entertainment area	55	53.0%	1	36	56.3%	1	6	18.4%	3 =
Barrel hall	29	28.0%	3	28	43.8%	2	10	19.6%	2
Conference facilities	14	13.0%	5	18	28.1%	3	3	10.7%	6
BBQ area	30	29.0%	2	17	26.6%	4	3	14.3%	5 =
Children's playground	16	16.0%	4	15	23.4%	5	4	16.7%	4
Wine cave	10	10.0%	6	5	7.8%	6 =	18	18.4%	3 =
Winemaking demos	8	8.0%	7 =	5	7.8%	6 =	5	14.3%	5 =
Historical displays	8	8.0%	7 =	5	7.8%	6 =	3	0.10%	7
Other facilities	6	6.0%	8	5	7.8%	6 =	10	34.5%	1

5.1.11.4 Services for people who have disabilities

5.1.11.4.1 Wheelchair access

Table 5.14 illustrates that in terms of services for the disabled, in 2010 the most common form of wheelchair access available was to both tasting rooms and toilet facilities (both 59.2 per cent) followed by access to the winery (33 per cent) and access to the vineyard (31.1 per cent). This follows the same trend as reported in 2010. Of note here is that wineries were least likely to offer wheelchair access to their restaurant or wine bar (33.8 per cent in 2003 and 23.3 per cent in 2010). In 1997 69 per cent of wineries reported that they offered wheelchair access to their tasting room, 46 per cent offered wheelchair access to their winery, and 41 per cent offered wheelchair access to their vineyard. Access to the restaurant and wine bar areas was stated at 30 per cent and access to toilets was reported at 53 per cent by those who responded to the 1997 survey.

Meeting the needs of disabled patrons appears to be reasonably well catered for by New Zealand wineries when it comes to both tasting room and toilet facilities. However it has to be noted that the fact that restaurant and wine bar facilities are stated as the least likely areas where disabled access is available is an issue which needs to be addressed given the increase reported in the 2010 survey of the number of restaurants now on offer as part of the overall service offering provided by wineries; failure to do so could risk in losing customers as Beames (2003) notes to better equipped customers who provided easier access for the disabled.

Table 5.14: Wheelchair access

Statement	Yes 1997	% 1997	Yes 2003	% 2003	Yes 2010	% 2010
Wheelchair access to tasting room	72	69.0%	65	81.3%	61	59.2%
Wheelchair access to winery	48	46.0%	40	50.0%	34	33.0%
Wheelchair access to vineyard	43	41.0%	27	33.8%	32	31.1%
Wheelchair access to restaurant/wine bar	31	30.0%	27	33.8%	24	23.3%
Wheelchair access to toilets	55	53.0%	56	70.0%	61	59.2%
Total no. respondents to question	104		80		103	

5.1.11.4.2 Services for people who have visual or hearing impairments

Table 5.15 shows that there was a four percentage point drop between the 2003 and 2010 surveys in those who offered services for visitors who suffered from visual impairments or hearing difficulties with the figure of 9.8 per cent in 2003 dropping to 5.8 per cent in 2010. However, those who answered “yes” to this question in the 2010 survey did cite that they offered those with hearing impairments and people with disabilities individualised personal customer service (this was from a small boutique winery), written material, visual aids in large type, and an understanding and acknowledgement of the needs of customers who required special assistance. No data from the 1997 survey was available for this question.

Table 5.15: Services for people who have visual or hearing impairments

Statement	Yes	# Responses (2003)	% (2003)	Yes	# Responses (2010)	% (2010)
Offer services for people who have visual or hearing impairments	7	71	9.8%	6	103	5.8%

5.2 Visitor Profile

The following are wineries' perceived visitor attributes in terms of age, gender and origin.

5.2.1 Perceived age breakdown

Figure 5.1 and Table 5.16 demonstrate the perceived breakdown of the age of winery visitors. In the 2010 survey most visitors (32.4 per cent) were in the 30-39 year age bracket, which is the same as previous trends exhibited in 1997 and 2003. The second most common age group were still those aged between 40-49 years (23 per cent in 2010). Of note here is the fact that there is clearly a growing demand for wine tourism amongst those within the 18-29 age group as this is now in third place at 17.7 per cent in 2010 up from fourth in 2003 (15.10 per cent). This has displaced the 50-59 year age group from third place to fourth at 15.4 per cent in 2010. Clearly this result points to the need for wineries to engage in a greater level of promotion to attract those within the 18-29 year age bracket if this trend is to be maintained; after all, those in this age group do represent future generations of wine tourists (Cohen & Ben-Nun 2009), and this growth needs to be encouraged by the New Zealand wine industry. This finding supports the potential that has been recognised amongst wine tourism researchers to exist within the Generation Y market (Beverland 2001; Treloar et al. 2004; Fountain 2011; Fountain & Charters 2010) where emphasising the social and leisure aspects of winery visitation (Treloar et al. 2004) needs to be focused on in order to promote further growth within this particular market.

Figure 5.1. Visitor Age

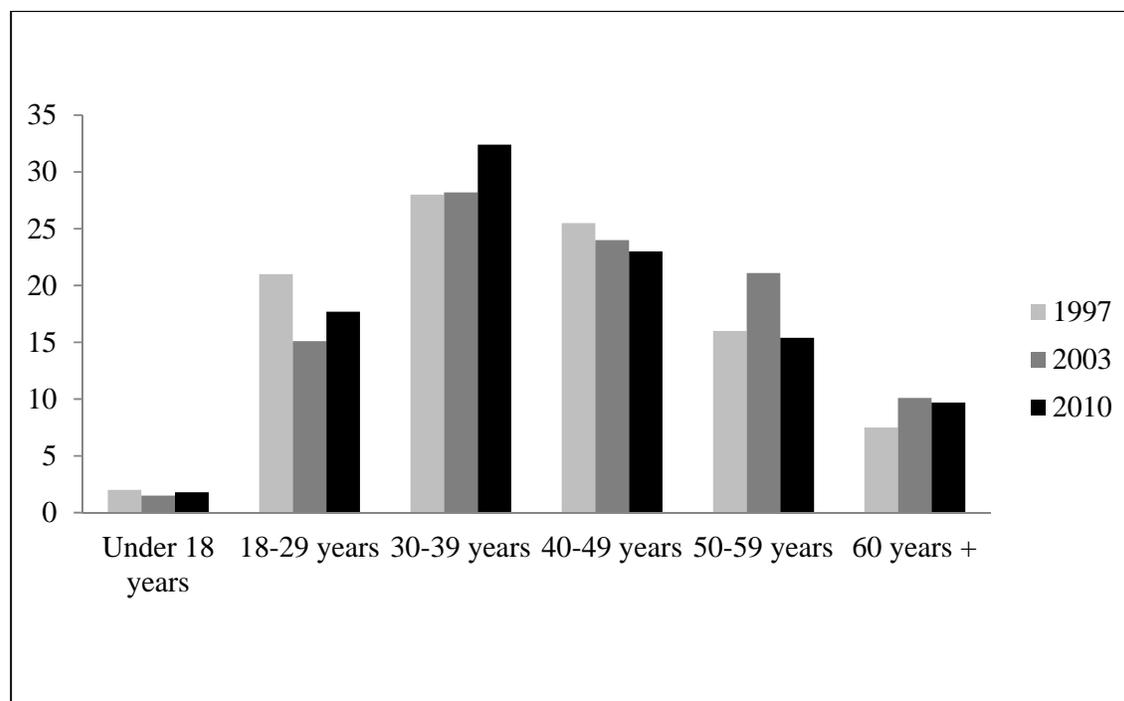


Table 5.16: Perceived age breakdown

Age group	1997	2003	2010
Under 18 years	2.00%	1.50%	1.80%
18-29 years	21.00%	15.10%	17.70%
30-39 years	28.00%	28.20%	32.40%
40-49 years	25.50%	24.00%	23.00%
50-59 years	16.00%	21.10%	15.40%
60 years +	7.50%	10.10%	9.70%

5.2.2 Perceived gender breakdown

As Table 5.17 shows, in the 1997, 2003 and 2010 surveys there was roughly a 50/50 split reported between visitors in terms of gender.

Table 5.17: Perceived gender breakdown

	1997	2003	2010
Male	50.0%	51.0 %	48.6%
Female	50.0%	49.0 %	50.4%

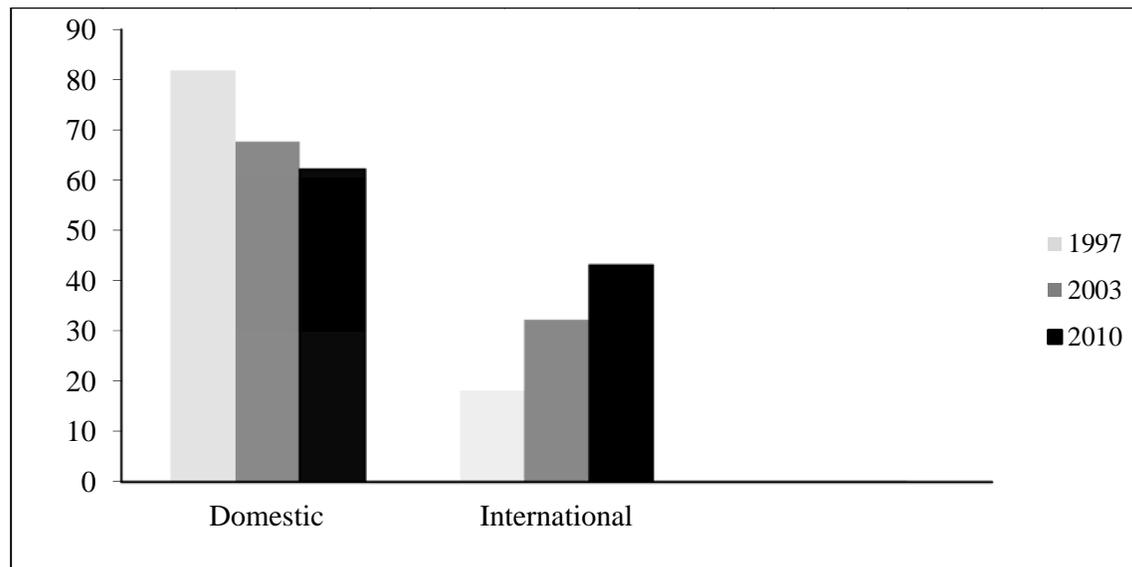
5.2.3 Perceived visitor origin breakdown

Figure 5.2 and Table 5.18 both show that in 2010 domestic visitors accounted for 57 per cent of visitors, while 43 per cent were from overseas. A trend can be observed across all three surveys of a growth in the number of international visitors, which has gone from 18.1 per cent in 1997 to 32.3 per cent in 2003, and continued to rise to 43 per cent in 2010. Meanwhile, the percentage of domestic visitors has dropped from 81.9 per cent in 1997 to 67.7 per cent in 2003. The 2010 survey reported a further 10.7 per cent decline in this figure to 57 per cent. With international visitors to New Zealand in 2010 recorded at 2,498,000 (Statistics New Zealand 2012), this reported growth in New Zealand wine tourism from overseas visitors is encouraging in the face of adverse economic conditions caused by the high New Zealand dollar relative to overseas currencies.

Table 5.18: Visitor origin

	1997	2003	2010
Domestic	81.9%	67.7%	57.0%
International	18.1%	32.3%	43.0%

Figure 5.2: Visitor origin



5.2.4 Wine Tourism Groups

5.2.4.1 Wine tours

59.8 per cent of respondents stated that commercial wine tours visit their winery (Table 5.19). This was an increase of 7.7 percentage points from 52.1 per cent reported in 2003 and also a significant increase on the 45 per cent figure reported in 1997. The most common type of tour according to the 2010 survey were those run by local tour operators (51.6 per cent) followed by self-guided tours (23.7 per cent), and was the same ranking as reported in both 2003 and 1997. There was a 17.1 per cent drop in the reported number of travel companies who incorporate wineries in their itinerary in the 2010 survey (17.5 per cent), down from 34.6 per cent reported in 2003. Determining why travel companies appear to be placing less value on wine tourism presents an area of future research. In order to maintain tourism related promotion of wineries, particularly amongst international visitors, it is vital that travel companies engage collaboratively with wineries. This decline could also be the result of smaller wineries within the survey sample simply not having the means to deal with large tour groups, hence the need for further research to ascertain if travel companies apparent disinterest in wine tourism is due to these size issues.

Table 5.19: Wine tours

Statement	Yes 1997	# 1997	% 1997	Yes 2003	# 2003	% 2003	Yes 2010	# 2010	% 2010
Commercial tours visit	47	104	45.0%	48	92	52.1%	49	82	59.8%
Self-guided tours visit	44	104	42.0%	20	52	38.5%	18	76	23.7%
Local tour operators visit	89	104	86.0%	52	69	75.0%	49	95	51.6%
Travel companies visit	34	104	33.0%	18	52	34.6%	18	97	17.5%

5.2.5 Visitor Information Collection

5.2.5.1 Visitor information collection methods

Based on those who responded with a 'yes' to this question, the most common visitor information collection methods listed by respondents (Table 5.20) in 2010 were that there was no systematic way of collection in place (34.1 per cent) followed by the use of mailing lists (25.3 per cent) which mirror the top two ranked methods in 2003. The main change from the 2003 survey is that the use of surveys has increased almost two-fold with a rise of 10.2 percentage points to rank third at 22.4 per cent. Those who chose 'Other methods' in 2010 (12.4 per cent) reported maintaining a visitor comments book, counting visitors as they came in, and using sales records to record visitor information. In the 1997 survey 58 per cent of producers reported that they counted visitor numbers systematically. Mailing listings was the method most frequently used, with till receipts used by 29 per cent.

Being able to accurately record visitor numbers is recognised as important as this then lets individual wineries adopt the most appropriate strategy in terms of promotion and attracting future visitors, and also allows for wineries to gauge how many visitors are repeat customers (Dodd 1995; Dodd & Bigotte 1995, 1997; Maddern & Golledge 1996; Paterson 2000; Cullen et al. 2006) or visiting for the first time (Hashimoto & Telfer 2003). The fact that there is still largely no systematic way of collecting visitor numbers for many wineries support the assertion of Mitchell and Hall (2006) that there needs to be more surveys conducted at the cellar door in order to try to establish the exact nature of the wine tourist and their motivations for visitation. Although such surveys have been done before at New Zealand wineries (Hall and Johnson 1997; Christensen et al. 2004; Mitchell 2004), accuracy in terms of recording visitor numbers has been a recognised as a significant issue (Mitchell & Hall 2006), and this is an area which needs to be addressed by both winery operators and those undertaking future research in this area.

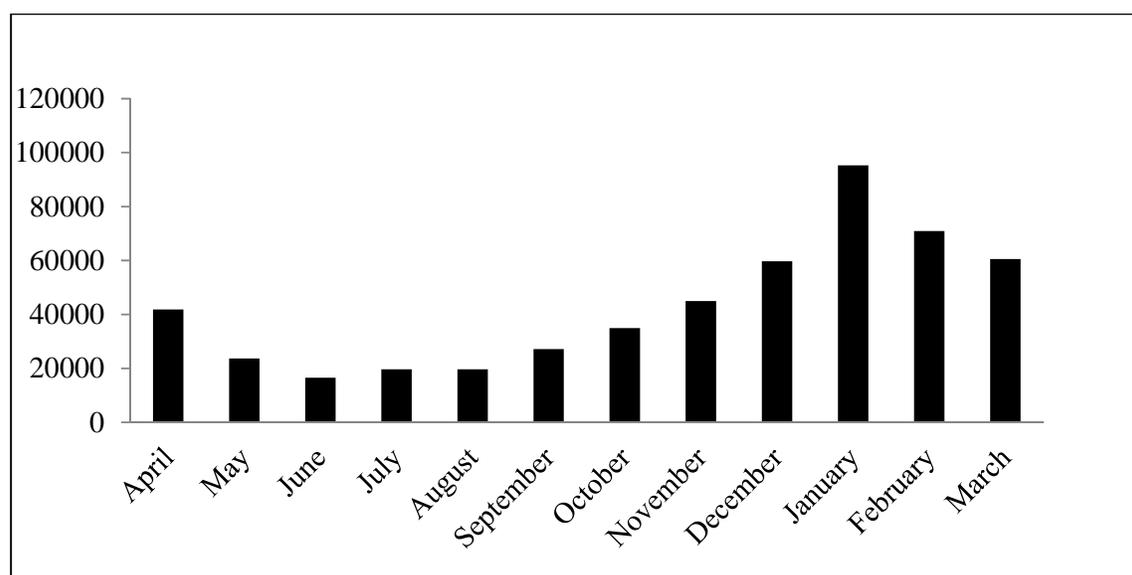
Table 5.20: Visitor information collection methods

Method	Yes 1997	# 1997	% 1997	Yes 2003	# 2003	% 2003	Yes 2010	# 2010	% 2010
No systematic way	49	84	58.0%	34	83	41.0%	31	91	34.1%
Mailing list	53	84	63.0%	27	82	32.9%	25	99	25.3%
Surveys	-	-	-	10	82	12.2%	19	85	22.4%
Till receipts	24	84	29.0%	27	82	34.1%	15	96	15.6%
Counters	12	84	14.0%	11	82	13.4%	13	92	12.6%
Other methods	-	-	-	14	83	16.9%	12	97	12.4%

5.2.6 Number of visitors

Figure 5.3 shows the estimated number of visitors reported by the New Zealand wineries who took part in the 2010 survey over the period of April 2009-March 2010. The busiest month for wineries was January 2010, when 95,259 people in total were estimated to have visited wineries nationally. The quietest month for wineries was reported to be June 2009, with 16,603 visitors estimated in total.

Figure 5.3. Estimated number of winery visitors per month (April 2009 – March 2010)



5.2.7 Reasons for visit

Table 5.21 illustrates that the reasons for visiting wineries varied, with tasting wines (98.7 per cent) and buying wines (71.8 per cent) maintaining their position of first and second respectively from the 1997 and 2003 survey in the 2010 results. Learning about wines and a day out ranked third equal in 2010 (36.9 per cent each). Meeting the winemaker became the fourth most important reason in the 2010 survey (27.2 per cent), while relaxation (23.3 per cent) was also regarded as an important reason. Other reasons cited by respondents in 2010 included recommendations from others who had previously visited a particular winery, functions, weddings, musical performances, art shows and visitors' desire to support wineries who are Carbon Zero certified.

These findings revealed some interesting shifts, and demonstrated that the perception that visitors' desire to meet those responsible for producing the wine that they are either sampling or purchasing is no longer perceived to be as important as it was in the 1997 and 2003 surveys. On this note Hall and Johnson (1998: 75) point out that "this may be undue modesty on the part of the winemaker (who in many cases would be the person completing the questionnaire) rather than the actual situation". The educational function (Reid 1990; Ravenscroft & Van Westering 2001; Marzo-Navarro & Pedra-Iglesias 2009) though is still important, but it would seem that this could be done by staff members who were well versed in the product rather than the actual winemaker. The desire for escapism (Hall & Johnson 1998) and indulgent behaviours (Galloway et al. 2008) were perceived as motivating factors, yet it has to be noted that sustainable practices have also had an effect on consumer perceptions, with Carbon Zero certification being raised as a reason why wine tourists chose to visit particular wineries. The influence of referrals from family and friends through word of mouth (Jayawardena et al. 2008; Maddern & Golledge 1996; Patterson 2000) was also cited as another key factor in encouraging winery visitation.

Table 5.21: Reasons for visit

Reason	# 1997	% 1997	Rank 1997	# 2003	% 2003	Rank 2003	# 2010	% 2010	Rank 2010
Tasting wines	68	84.0%	1	75	91.5%	1	76	98.7%	1
Buying wines	67	80.0%	2	68	82.9%	2	74	71.8%	2
Learning about wines	38	46.0%	4	47	57.3%	3	38	36.9%	3 =
A day out	44	54.0%	3	39	47.6%	4	38	36.9%	3 =
Socialising	20	24.0%	7	34	41.5%	5	22	21.4%	7 =
Winery tour	29	34.0%	6	26	31.7%	6	19	18.4%	9
Meeting the winemaker	19	23.0%	8	23	28.0%	7	28	27.2%	5
Relaxation	31	38.0%	5	21	25.6%	8	24	23.3%	6
Festivals or events	15	18.0%	9	14	17.1%	9	22	21.4%	7 =
Organic wines	-	-	-	6	7.3%	10 =	6	5.8%	11
Other	5	6.0%	10	6	7.3%	10 =	14	13.6%	10

5.2.8 Visitor attributes

Visitor market segmentation figures (Figure 5.4 and Table 5.22), based on the tripartite typology devised by Hall (1996), indicated that most wineries in the 2010 survey perceived the majority of visitors (62.4 per cent) to be ‘Wine interested’ followed by those visitors who were categorised as being a ‘Wine lover’ (29.7 per cent). Visitors who were regarded as ‘Wine curious’ ranked third at 10.2 per cent. The same trend applied in the 2010 survey to the 2003 survey, while those who were in the ‘Wine curious’ segment were listed as ranked second in the 1997 results. It is however interesting to note that after suffering a sharp decline that saw a drop from 21.4 per cent in 1997 to only 7.3 per cent in 2003 the ‘Wine curious’ segment was perceived as having grown in the 2010 survey by 2.9 percentage points. This tripartite typology of wine tourists (Hall 1996) has also been applied in other wine tourism research (Hall & Johnson 1997; Charters & Ali-Knight 2001; Christensen et al. 2004; Houghton 2008) in order to attempt to characterise visitor attributes.

Figure 5.4: Visitor market segments

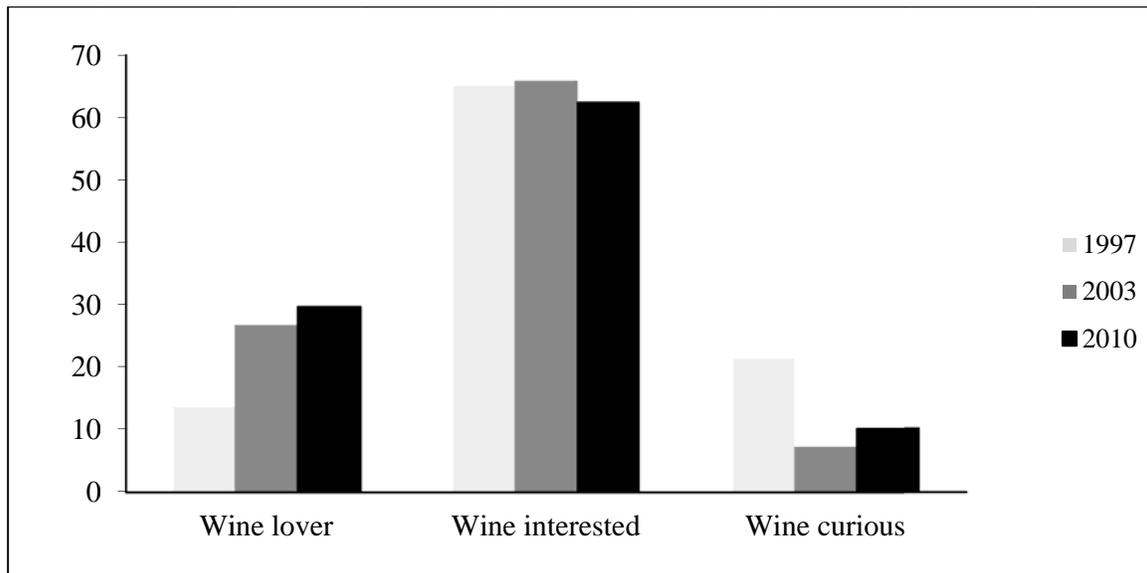


Table 5.22: Perceived visitor interest in wines

Year	Wine lover	Wine interested	Wine curious
1997	13.6%	65.0%	21.4%
2003	26.8%	65.9%	7.3%
2010	29.7%	62.4%	10.2%

5.2.9 Visitor information

5.2.9.1 Benefits of information on visitor numbers and characteristics for wineries

In 2010 49.5 per cent of those surveyed believed that information on visitor numbers and characteristics was of benefit to their business. This has dropped significantly from 65 per cent in the 1997 survey, but as a result the 2010 result drops less than one percentage point from the 50.4 per cent recorded in 2003.

5.3 Environmental Issues

5.3.1 Biosecurity

5.3.1.1 Biosecurity measures

When asked whether their vineyard had biosecurity measures in place for wine tourists in 2010, 22.3 per cent of respondents believed that the current measures that they employed were adequate, while over three quarters of respondents (77.7 per cent) believed that the biosecurity measures that they employed were inadequate to cope with any potential biosecurity threats that may be brought onsite by wine tourists. This is in contrast to when the same question was posed in the 2003 survey, which showed that only 11.9 per cent of wineries had biosecurity measures in place, and reveals a 10.4 percentage point increase in the number of wineries who now have such measures on site in 2010. These figures highlight that there is a gap in the knowledge of wineries towards the potential dangers presented by biosecurity threats due to a lack of adequate information sharing by those responsible for the governance of biosecurity protocols (Hall 2003; Renton et al. 2009).

5.3.1.2 Visitor access

Respondents were also asked whether visitors were able to wander freely amongst the vines on their winery. 31.1 per cent allowed visitors to walk amongst the vines at their winery, while the remaining 68.9 per cent did not allow visitor access to areas onsite. With almost a third of New Zealand wineries reporting that visitors were able to wander freely amongst the vines when they visited a New Zealand winery it appears that the attitude towards risk mitigation requires a more cautious approach underpinned by a higher level of awareness with regard to the consequences that a disease outbreak could have for the New Zealand wine industry (see discussion in Chapter

3). As Poitras et al. (2006) suggest, a lack of protection of the natural environment can effectively shatter any long term strategies that wineries have in place with regard to sustainability initiatives, no matter how honourable the motivations behind such strategies may be.

5.3.1.3 Strategies and information to deal with biosecurity threats

As Table 5.23 indicates, almost half of the respondents surveyed (48.5 per cent) were unsure as to whether they had effective strategies in place to deal with biosecurity threats. 24.3 per cent felt that the current strategies that they were employing would be effective, while 19.4 per cent were in disagreement with this statement and felt that the strategies currently available to them were ineffective. Over half (51.5 per cent) replied that they felt unsure that the current level of information available regarding biosecurity threats that they received was adequate. 25.2 per cent disagreed that the information currently received regarding biosecurity threats from Government agencies was inadequate, while only 9.7 per cent were in agreement with this statement.

The area of greatest concern here appears to be the high level of uncertainty amongst respondents as to whether or not they believed that they currently had an effective strategy in place to deal with potential biosecurity threats. With 19.4 per cent of respondents deeming current strategies in this area as ineffective, it would seem that this in itself is an issue of concern for those in positions of governance. 31.1 per cent of respondents stating that they received no information at all from any organisation charged with the governance of sustainable practices, so clearly there is a significant gap in information sharing presently that needs to be addressed.

Table 5.23: Strategies and information available to deal with biosecurity threats

Statement	Strongly disagree	Disagree	Unsure	Agree	Strongly agree
Winery currently has an effective strategy in place to deal with potential biosecurity threats	5.8%	19.4%	48.5%	24.3%	1.9%
Winery receives adequate biosecurity information from Government agencies	7.8%	25.2%	51.5%	9.7%	5.8%

5.3.1.4 Sources of information regarding biosecurity threats

Table 5.24 shows that New Zealand Winegrowers were cited by the wineries surveyed as the most reliable source of information regarding biosecurity threats (84.5 per cent). This was followed by the Ministry of Agriculture and Forestry (57.3 per cent) and word of mouth (25.2 per cent). The least reliable sources of information were Crown Research Institutes and Universities or Polytechnics at 3.9 per cent each. Information accessibility (Renton et al. 2009) needs to be improved and biosecurity protocols standardised, otherwise the New Zealand wine industry is running the risk of being seriously affected by potential disease outbreaks.

Table 5.24: Information sources regarding biosecurity threats

Source	# 2010	% 2010
Ministry of Agriculture and Forestry	59	57.3%
New Zealand Winegrowers	87	84.5%
Local or regional councils	39	37.9%
Crown Research Institutes	4	3.9%
Universities or polytechnics	4	3.9%
Other competing businesses within the wine industry	11	10.7%
Websites	8	7.8%
Television	13	12.6%
Newspapers	17	16.5%
Word of mouth	26	25.2%
Other	7	6.8%

Note: Respondents can provide multiple answers

5.3.1.5 Biosecurity and the Sustainable Wineries New Zealand (SWNZ) scheme

Underpinning the evidence found regarding biosecurity in relation to sustainable practices in the 2010 New Zealand National Winery Survey is the apparent contradiction of the aforementioned argument put forward by Poitras et al. (2006); 58.3 per cent of wineries surveyed in 2010 believed that there was no need for a biosecurity component within the SWNZ scheme. Clearly, encouraging adoption of the SWNZ scheme could present a prime opportunity to improve the poor levels of information sharing with regard to biosecurity threats (Hall 2003). By promoting SWNZ as a quality source of information regarding biosecurity protocols this could give the scheme added value, and in turn attract a greater rate of adoption of the scheme.

5.3.2 Sustainability

5.3.2.1 Belief in the importance of sustainability practices

Table 5.25 shows that over half of the respondents in the 2010 survey either agreed or strongly agreed that sustainability practices are important for the New Zealand wine industry. 19.4 per cent of respondents were unsure about the importance of such practices, while over a quarter of respondents either disagreed or strongly disagreed that sustainability practices were important. In contrast to the position of Wine New Zealand, over half of the respondents did not believe that sustainability practices provided wineries with a source of competitive advantage.

Based on these findings it appears that there is some disagreement within the New Zealand wine industry as to whether there is any real value to be gained from the adoption of the SWNZ scheme, and this is underlined by an indifferent attitude shown towards sustainable methods of production. There is a distinct division in terms of agreement over the importance of sustainability practices, which runs counter to one of the main aims of SWNZ which is to implement a model of best practice for all wineries to use as a benchmark (SWNZ 2010). If there

is little or no perceived advantage to be gained when viewed from the supply-side perspective in terms of competitive advantage (38.8% disagreed that sustainable methods provided this in this survey), then in order to achieve a high rate of adoption of the scheme SWNZ must address this gap. Institutional pressures are not the sole significant force at play here. Sinha et al. (2010) suggest that other factors such as the export orientation of wineries are also important, as the end consumer places value on how many food miles a product that is supposedly sustainable has clocked up in reality, while Zucca et al. (2009) cite winery size, financial means and resource availability as critical factors in the adoption of sustainable practices. This would suggest that adoption of sustainable practices by New Zealand wineries is inhibited by SWNZ's approach where wineries are treated in a somewhat homogenous manner regardless of size, financial means and stage of business development (Carmichael et al. 2012). By disregarding the individual nature of the wineries which SWNZ are aiming to attract it would seem that full industry adoption of the SWNZ scheme in 2012 could be asking for the impossible.

Table 5.25: Industry beliefs in the importance of sustainability

Statement	Strongly disagree	Disagree	Unsure	Agree	Strongly agree
Sustainability practices are important for the New Zealand wine industry	7.5%	18.4%	19.4%	33%	21.4%
Sustainability provides an important source of competitive advantage	16.5%	38.8%	16.5%	17.5%	10.7%

5.3.2.2 Membership of the Sustainable Wineries New Zealand (SWNZ) scheme

Only 56.3 per cent of wineries surveyed in 2010 stated that they were accredited members of the SWNZ (Table 5.26). This figure speaks volumes about the seeming disparity between the vision of SWNZ where all wineries are participants of this scheme by 2012, and the reality that some

wineries simply appear to either not see any true value being gained through accreditation, or mistrust the ability of SWNZ to be able to follow through on delivering the strategic intent on which this scheme is based. This disparity is further enhanced by the fact that 15.5 per cent of wineries state that their only relationship with SWNZ is when it is required, which as a figure does not bode well in the context of attracting more wineries to adopt the aims of the scheme; this lack of confidence is also reflected by only 5.8 per cent of respondents considering it as beneficial to have SWNZ involved in terms of cooperative marketing or promotion, which is embarrassing to say the least when the promotion of sustainable methods of production is noted as being attractive to the success of wineries with a strong export orientation (Sen et al. 2004; Sinha et al. 2010). With several respondents highlighting the fact that membership of the SWNZ scheme is now mandatory if wineries wish to participate in events such as trade shows or engage in exporting their products it appears that there exists resistance towards the motives of SWNZ within some sectors of the New Zealand wine industry.

Table 5.26: Type of relationship of wineries surveyed in 2010 with SWNZ

Type of relationship with SWNZ			
None	Contact as required	Member	Cooperative marketing or promotion
22.4%	15.5%	56.3%	5.8%

5.3.2.3 Reasons for choosing to employ sustainability practices

Leading reasons for the employment of sustainable methods (Table 5.27) were found to be the reduction of environmental impacts (60.2 per cent) the reduction of costs (29.1 per cent) and the improvement of productivity (21.4 per cent). Attracting wine tourists, and in turn also seeking to increase revenue through openly advocating sustainability, were not viewed by wineries as

motivating factors to adopt these methods, which disputes the notion that innovative practices as an important dimension to the tourist destination experience (Sørensen 2001; Stamboulis et al. 2003). An overwhelming majority of 88.3 per cent of respondents stated that they did not choose to employ sustainability practices to increase revenue. Other reasons that were given by respondents for the adoption of sustainable practices included soil health, ‘company conscience’, the fact that SWNZ membership was compulsory, and also that it was mandatory to be a member of SWNZ if wineries wanted to enter wine shows. Respondents also stated that they felt that SWNZ membership had no real benefit to them, and one respondent even went as far as to refer to sustainability as “paper pushing B.S.”.

Table 5.27: Reasons for winery choosing to employ sustainability practices

Reason	Yes	No
To increase revenue	11.7%	88.3%
To reduce costs	29.1%	70.9%
To increase market share	16.5%	83.5%
To reduce energy consumption	32%	68%
To reduce environmental impact	60.2%	39.8%
To establish/ or exploit new market opportunities	19.4%	80.6%
To improve productivity	21.4%	78.6%
To attract visitors to my winery	12.6%	87.4%
Other	29.1%	70.9%

5.4 Innovation

The following results illustrate levels of innovation within the New Zealand wine industry, and compare these findings with the benchmark provided by the average overall 2007 New Zealand innovation levels and New Zealand agricultural sector innovation levels from the same period as reported in the *Innovation in New Zealand 2007* study (Statistics New Zealand 2007).

5.4.1 Introduction of innovation in the New Zealand wine industry

The first set of questions on innovation asked respondents whether they had introduced any innovations over the two financial years prior to 2009. Results indicate that 67 per cent of respondents had not introduced any new or improved goods or services over this period, while the remaining 33 per cent stated that their vineyards had made changes to previously existing goods or services on offer (Table 5.28 and Figure 5.5). This figure is just over twice the New Zealand agricultural innovation average recorded in 2007 (16 per cent), and is also seven percentage points higher than the overall 2007 New Zealand innovation average of 23 per cent (Statistics New Zealand 2007). Only 22.3 per cent of respondents reported that they had introduced new or significantly improved operational processes, which also includes sustainable production methods. This result is similar to the 2007 New Zealand agricultural innovation average of 21 per cent (Statistics New Zealand 2007), while the overall 2007 New Zealand innovation average for introducing improved operational processes was only slightly higher than that of the New Zealand wine industry at 23 per cent (Statistics New Zealand 2007). 39.8 per cent of wineries had decided to implement new or significantly improved organisational or managerial processes in their businesses. This is much higher than the 2007 New Zealand agricultural innovation average of 15 per cent (Statistics New Zealand 2007) and also looks positive compared to the overall 2007 New Zealand innovation average of 27 per cent (Statistics New Zealand 2007). The highest degree of innovation occurred in the implementation of new or

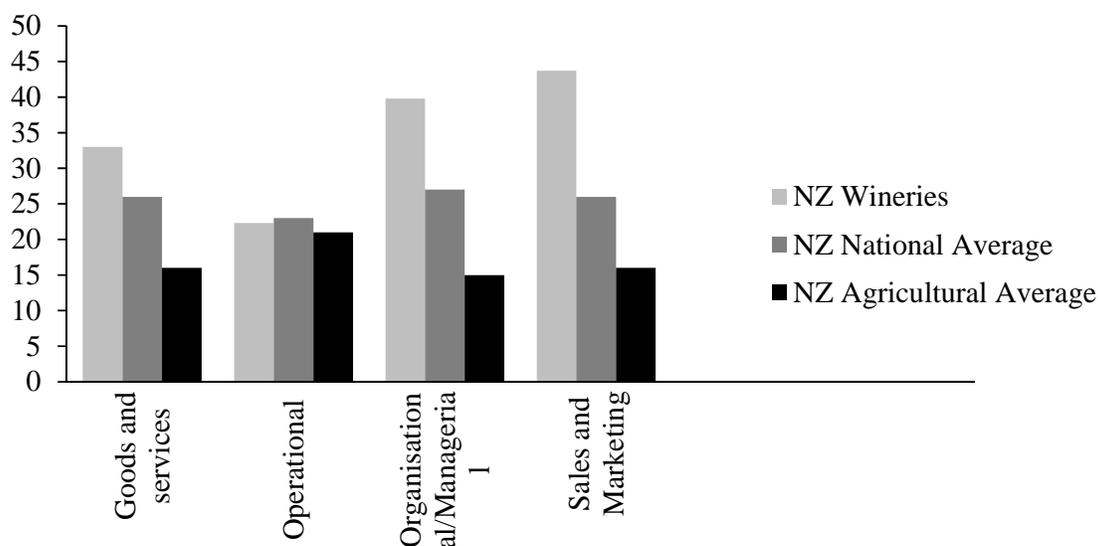
significantly improved sales or marketing methods which was reported as 43.7 per cent, which is also much higher when than the 2007 New Zealand agricultural innovation average in this category of 16 per cent (Statistics New Zealand 2007) and the overall 2007 New Zealand innovation average of 26 per cent (Statistics New Zealand 2007).

Table 5.28: Introduction of innovation over the two financial years prior to 2009

Statement	Yes	No	NZ National Average 2007	NZ Average Agriculture 2007
Did your winery introduce any new or improved goods or services over the last 2 financial years?	33.0%	67.0%	26.0%	16.0%
Did your winery introduce on to the market any new or significantly improved operational processes over the last 2 financial years?	22.3%	77.7%	23.0%	21.0%
Did your winery implement any new or significantly improved organisational or managerial processes over the last 2 financial years?	39.8%	60.2%	27.0%	15.0%
Did your winery implement any new or significantly improved sales or marketing methods over the last 2 financial years?	43.7%	56.3%	26.0%	16.0%

Source for New Zealand 2007 Averages: Statistics New Zealand (2007)

Figure 5.5. Introduction of innovation over the two financial years prior to 2009



Source for New Zealand 2007 averages: Statistics New Zealand (2007).

Based on winery size improved goods and services (Sig. = .029), new or significantly improved operational processes (Sig. = .002) and significantly improved organisational or managerial processes (Sig. = .002) were noted as significant factors for the introduction of innovation in wineries over the two years prior to 2009 at the .05 level of significance (Table 5.29).

Table 5.29: Introduction of innovation over the two financial years prior to 2009 based on winery size

Statement	Yes	No	F test statistic	Sig.
Did your winery introduce any new or improved goods or services over the last 2 financial years?	33.0%	67.0%	4.904	.029
Did your winery introduce on to the market any new or significantly improved operational processes over the last 2 financial years?	22.3%	77.7%	10.209	.002
Did your winery implement any new or significantly improved organisational or managerial processes over the last 2 financial years?	39.8%	60.2%	10.509	.002
Did your winery implement any new or significantly improved sales or marketing methods over the last 2 financial years?	43.7%	56.3%	2.345	.129

Significance is measured at the .05 level.

5.4.2 Sales from significantly improved goods or services

Table 5.30 illustrates that sales that came as a result of new or significantly improved goods or services were reported by 37.9 per cent of respondents as having had no effect on sales whatsoever in 2010. Only 13.6 per cent of wineries surveyed believed that innovations introduced had actually been responsible for ten per cent or less of their overall sales. These figures fall well below the 2007 New Zealand agricultural innovation averages and 2007 New Zealand innovation averages (Statistics New Zealand 2007), particularly in terms of there being no change at all. This category was reported as only two per cent nationally on average in 2007 (Statistics New Zealand 2007), and in the agricultural sector was reported as being at 15 per cent on average for the same year (Statistics New Zealand 2007). The size of the winery

concerned was not a significant factor in the percentage of sales from significantly improved goods or services ($F = 1586$, $\text{sig.} = .171$).

Table 5.30: Percentage of sales from significantly improved goods or services (2009 financial year) compared with innovation in New Zealand agriculture

Category	# 2010	% of Sales	NZ National Average	NZ Agricultural Average 2007
Zero	39	37.9%	2.0%	15.0%
10% or less	14	13.6%	43.0%	48.0%
20% or less	6	5.8%	23.0%	15.0%
30% or less	8	7.8%	10.0%	11.0%
40% or less	0	0	5.0%	0
41% - 100%	2	1.9%	7.0%	0
Don't know	34	33.0%	9.0%	8.0%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

5.4.2.1 Significantly improved goods or services based on size of winery

Significantly improved goods and services that were implemented based on the size of the winery (Table 5.31) which were found to be significant at the .05 level were those that were developed by the winery concerned ($\text{Sig.} = .017$) and those that were developed by the winery in partnership with others ($\text{Sig.} = .000$).

Table 5.31: Significantly improved goods or services based on winery size

Method used to make improvement	F test statistic	Sig.
Developed by this business	5.867	.017
Developed by this business in partnership with others	18.867	.000
Obtained from others and significant improvements made by your business	.265	.608
Obtained from others and NO significant improvements made by your business	-	-

Significance is measured at the .05 level.

5.4.2.2 Improvements made to goods or services

Only 8.7 per cent of wineries had opted to develop new or significantly improved goods or services in partnership with other business as indicated by Table 5.32. The remaining 91.3 per cent of respondents stated that they had not chosen to form business partnerships with others for this purpose. 30.1 per cent responded that had actually developed these new or significantly improved goods or services themselves, which falls well below the overall 2007 New Zealand innovation average of 60 per cent (Statistics New Zealand 2007), while 69.9 per cent replied that they had not, and that any new or improved goods or services were developed by other businesses. Hardly any wineries had obtained any new or significantly improved goods or services from others and then implemented changes themselves, with 98.1 per cent of respondents stating that they had not, while the remaining 1.9 per cent replied that they had used ideas obtained from others and incorporated these into their business. All wineries stated that if they had obtained new or significantly improved goods or services from others, then once these were implemented no further improvements were undertaken.

These results indicate that a degree of risk aversion presently exists within the New Zealand wine industry towards implementing innovation within existing goods and services, and supports the argument put forward by both Marks and Mortensen (2003) and Kaine et al. (2007) who cite that many businesses fear the impacts that failure can bring if an innovation is unsuccessful.

This is understandable though given the large amount of capital and confidence required to implement innovation, and is also particularly pertinent at a time where the New Zealand wine industry is struggling due to oversupply issues (Deliottes 2010).

Table 5.32: Significantly improved goods or services

Method used to make improvement	Yes	No	NZ National Average 2007
Developed by this business	30.1%	69.9%	60.0%
Developed by this business in partnership with others	8.7%	91.3%	23.0%
Obtained from others and significant improvements made by your business	1.9%	98.1%	17.0%
Obtained from others and NO significant improvements made by your business	-	-	18.0%

Source for New Zealand 2007 Average: Statistics New Zealand 2007

5.4.3 Improvements made to operational processes

Of those wineries who had opted to introduce new or significantly improved operational processes (Table 5.33), 17.5% of businesses had developed their own innovative methods, which is well below the overall 2007 New Zealand innovation average of 62 per cent. The remainder (82.5 per cent) had either not improved their operational processes, or if they had, this had not been done onsite at the actual winery itself. 5.8 per cent of wineries reported that these significantly improved operational processes had been developed in partnership with others, while the remainder (94.2 per cent) had not developed these processes in partnership with other businesses. 2.9 per cent reported that they had developed significantly improved operational processes in partnership with other businesses, while the remainder (97.1 per cent) had not. Only one per cent reported that they had implemented significantly improved operational processes which had been obtained from others, and that they had made no further improvements to these processes once they were introduced.

Reluctance to implement or adopt new or significantly improved operational processes once again touches on the unwillingness of some wineries to engage in collaboration and co-operation within existing clusters and networks (Kuah 2002; Aylward & Turpin 2003; Chiffolleau 2005; Aylward 2005a, 2005b, 2006b, 2006c; Chiffolleau et al. 2006; Bou et al. 2008; Cusmano et al.

2008; Dana & Winstone 2008; Fleet 2008; Taplin & Breckenridge 2008; Touzard 2010; Dana et al. 2011; Hira & Bwenge 2011). This points towards the existence of an important area of future research within the New Zealand wine industry to determine why the level of innovation reported here falls so far below the 2007 national average.

Table 5.33: Significantly improved operational processes

Method used to make improvement	Yes	No	NZ National Average 2007
Developed by this business	17.5%	82.5%	62.0%
Developed by this business in partnership with others	5.8%	94.2%	24.0%
Obtained from others and significant improvements made by your business	2.9%	97.1%	17.0%
Obtained from others and no significant improvements made by your business	1.0%	99.0%	18.0%

Source for New Zealand 2007 Average: Statistics New Zealand (2007)

5.4.3.1 Significantly improved operational processes based on winery size

Significantly improved operational processes that were implemented based on the size of the winery (Table 5.3.4) which were found to be significant at the .05 level were either developed by the winery concerned in partnership with others (Sig. = .001) and or were operational processes that were obtained from others with no significant improvement made (Sig. = .011).

Table 5.34: Significantly improved operational processes based on size of winery

Method used to make improvement	F	Sig.
Developed by this business	3.354	.070
Developed by this business in partnership with others	12.311	.001
Obtained from others and significant improvements made by your business	.075	.785
Obtained from others and NO significant improvements made by your business	6.641	.011

Significance is measured at the .05 level.

5.4.4 Improvements made to organisational and managerial processes

Significantly improved organisational and managerial processes (Table 5.35) were developed by 30.1 per cent of those surveyed, while 9.7 per cent stated that they developed these processes in partnership with other businesses. These results are once again well under half of those recorded as the 2007 New Zealand innovation averages in these areas, which were 68 per cent and 23 per cent respectively (Statistics New Zealand 2007). 4.9 per cent of wineries reported that they had obtained improved organisational and managerial processes from other business, while the 2007 New Zealand innovation average in this category was 18 per cent (Statistics New Zealand 2007). 4.9 per cent also reported that they made no further improvements to these processes once they had obtained them from others in comparison to the 2007 New Zealand innovation average of nine per cent in the same area (Statistics New Zealand 2007).

Table 5.35: Significantly improved organisational and managerial processes

Method used to make improvement	Yes	No	NZ National Average 2007
Developed by this business	30.1%	69.9%	68.0%
Developed by this business in partnership with others	9.7%	90.3%	23.0%
Obtained from others and significant improvements made by your business	4.9%	95.1%	18.0%
Obtained from others and NO significant improvements made by your business	4.9%	95.1%	9.0%

Source for New Zealand 2007 Average: Statistics New Zealand 2007

5.4.4.1 Improvements made to organisational and managerial processes based on winery size

Table 5.36 shows that significantly improved organisational or managerial processes implemented based on the size of the winery significant at the .05 level were those that were developed by the winery concerned (Sig. = .001) or those that were developed by the winery in partnership with others (Sig. = .000).

Table 5.36: Significantly improved organisational or managerial processes based on winery size

Method used to make improvement	F	Sig.
Developed by this business	12.029	.001
Developed by this business in partnership with others	36.875	.000
Obtained from others and significant improvements made by your business	.014	.908
Obtained from others and NO significant improvements made by your business	.361	.550

Significance is measured at the .05 level.

5.4.5 Improvements made to sales and marketing methods

Significantly improved sales and marketing methods (Table 5.37) were reported as having being developed by 35 per cent of wineries, which is well below the 2007 New Zealand innovation average of 53 per cent (Statistics New Zealand 2007). 13.6 per cent indicated that these methods were developed in partnership with other businesses, which in comparison rated at 31 per cent for the 2007 New Zealand innovation average (Statistics New Zealand 2007). Only 8.7 per cent stated that they had obtained improved sales and marketing methods from other businesses. This is low compared to the 2007 New Zealand innovation average of 17 per cent for this category (Statistics New Zealand 2007). 3.9 per cent made no further improvements to these processes upon implementation.

Table 5.37: Significantly improved sales and marketing methods

Method used to make improvement	Yes	No	NZ National Average 2007
Developed by this business	35.0%	65.0%	53.0%
Developed by this business in partnership with others	13.6%	86.4%	31.0%
Obtained from others and significant improvements made by your business	8.7%	91.3%	17.0%
Obtained from others and NO significant improvements made by your business	3.9%	96.1%	15.0%

Source for New Zealand 2007 Average: Statistics New Zealand 2007

Improved sales or marketing methods that implemented based on the size of the winery (Table 5.38) that were significant at the .05 level were noted as only being those developed by the winery in partnership with others (Sig. = .021).

Table 5.38: Significantly improved sales or marketing methods based on size of winery

Method used to make improvement	F	Sig.
Developed by this business	3.686	.058
Developed by this business in partnership with others	5.482	.021
Obtained from others and significant improvements made by your business	3.291	.073
Obtained from others and NO significant improvements made by your business	.071	.791

Significance is measured at the .05 level.

5.4.6 Reasons for innovation

The reasons given for innovation were varied (Table 5.39), with the need to establish or exploit new market opportunities given as the main reason (52.4 per cent). This was well above the 2007 New Zealand innovation average of 38 per cent (Statistics New Zealand 2007) and the 2007 New Zealand agricultural sector innovation average of 32 per cent (Statistics New Zealand 2007). Desires to increase market share and reduce costs ranked second equal (50.5 per cent), followed by the need to reduce environmental impacts (47.6 per cent). Improvements to productivity and the creation of an increased responsiveness to customers both ranked third equal at 45.6 per cent. Other notable mentions were to increase productivity (41.7 per cent) and to reduce energy consumption (35 per cent).

Compared with the 2007 New Zealand innovation and agricultural sector averages, the need to reduce costs fell below the national average in 2007 of 71 per cent (Statistics New Zealand 2007), while exceeding the agricultural sector average of 28 per cent (Statistics New Zealand 2007), while exceeding the agricultural sector average of 28 per cent (Statistics New Zealand 2007).

2007), while increases in market share were slightly above the agricultural sector average of 45 per cent (Statistics New Zealand 2007), but still below the 2007 New Zealand innovation average of 68 per cent (Statistics New Zealand 2007). Reducing energy consumption was an area where New Zealand wineries really stood out against the 2007 New Zealand innovation average which was only 26 per cent (Statistics New Zealand 2007) and the agricultural sector average, which was less than half that of the 35 per cent reported by wineries at 17 per cent (Statistics New Zealand 2007).

Table 5.39: Reasons for innovation

Reason	Yes	No	Don't know	NZ National Average 2007	NZ Agricultural Average 2007
To improve productivity	45.6%	28.2%	26.2%	66.0%	64.0%
To increase productivity	41.7%	31.1%	27.2%	66.0%	64.0%
To reduce costs	50.5%	22.3%	27.2%	71.0%	28.0%
To increase responsiveness to customers	45.6%	26.2%	28.2%	59.0%	51.0%
To increase market share	50.5%	20.4%	29.1%	68.0%	45.0%
To establish/ or exploit new market opportunities	52.4%	24.3%	23.3%	38.0%	32.0%
To improve work safety standards	23.3%	43.7%	33.0%	24.0%	26.0%
To reduce energy consumption	35.0%	35.0%	30.1%	26.0%	17.0%
To reduce environmental impact	47.6%	27.2%	25.2%	33.0%	18.0%
To replace goods and services being phased out	5.8%	63.1%	31.1%	26.0%	35.0%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

Reasons for innovation based on winery size that are significant based on the .05 significance level were to increase productivity (Sig. = .036), to reduce energy consumption (Sig. = .002) and to reduce environmental impact (Sig. = .017).

Table 5.40: Reasons for innovation based on winery size

Reason	Yes	No	Don't know	F	Sig
To improve productivity	45.6%	28.2%	26.2%	34.30	.036
To increase productivity	41.7%	31.1%	27.2%	2.617	.078
To reduce costs	50.5%	22.3%	27.2%	3.008	.054
To increase responsiveness to customers	45.6%	26.2%	28.2%	2.305	.105
To increase market share	50.5%	20.4%	29.1%	1.395	.253
To establish/ or exploit new market opportunities	52.4%	24.3%	23.3%	2.621	.078
To improve work safety standards	23.3%	43.7%	33.0%	.926	.400
To reduce energy consumption	35.0%	35.0%	30.1%	6.842	.002
To reduce environmental impact	47.6%	27.2%	25.2%	3.735	.017
To replace goods and services being phased out	5.8%	63.1%	31.1%	2.247	.111

Significance is measured at the .05 level.

5.4.7 Sources of ideas and information for innovation

Sources of ideas and information for innovation (Table 5.41) primarily came from existing staff (52.4 per cent) or competitors and other businesses within the wine industry (33 per cent). New staff (32 per cent) and also suggestions from customers (31.1 per cent) were also cited as important, while ideas and information from books, journals, patent disclosures and the Internet are also a resource (29.1 per cent). Of interest is that Crown Research Institutes and Government agencies both rated poorly as sources, polling at 6.8 per cent and 7.8 per cent respectively.

No New Zealand agricultural averages are available for this section. However, based on the 2007 New Zealand innovation average existing staff were viewed as the main source of information used by businesses at 70 per cent (Statistics New Zealand 2007), while customers were viewed as the second most important source of information at 57 per cent (Statistics New Zealand 2007). Information from other businesses within the same business group ranked ninth at 31 per cent (Statistics New Zealand 2007). New staff (51 per cent) rated as the third most important source of information (Statistics New Zealand 2007), while Crown Research Institutes rated as the least

likely source of information to be used (Statistics New Zealand 2007), which is in agreement with what the 2010 survey found from New Zealand wineries. These findings suggest that there is a distinct lack of institutional support currently available to New Zealand wineries specifically designed to encourage innovation. Such support has been noted as an important factor in increasing levels of innovation (Simpson 2005; Aylward 2006a; Guthey 2008; Powrie & O'Connor 2010; Hira & Bwenge 2011).

Table 5.41: Sources of ideas and information for innovation

Source	Yes	No	Don't know	NZ National Average 2007
New staff (appointed in the last 2 years)	32.0%	64.1%	3.9%	51.0%
Existing staff	52.4%	45.6%	1.9%	70.0%
Other businesses within the business group (e.g. subsidiaries or parent companies)	14.6%	82.5%	2.9%	31.0%
Customers	31.1%	65.0%	3.9%	57.0%
Suppliers	30.1%	68.0%	1.9%	47.0%
Competitors and other businesses from the same industry	33.0%	63.1%	3.9%	45.0%
Businesses from other industries (not including customers or suppliers)	20.4%	74.8%	4.9%	22.0%
Professional advisors, consultants, banks or accountants	27.2%	68.9%	3.9%	44.0%
Books, journals, patent disclosures or the Internet	29.1%	65.0%	5.8%	41.0%
Wine shows, festivals or conferences	22.3%	71.8%	5.8%	46.0%
Industry or employer organisations	19.4%	74.8%	5.8%	30.0%
Universities or polytechnics	11.7%	83.5%	4.9%	9.0%
Crown Research Institutes, other research institutes or research associations	6.8%	88.3%	4.9%	7.0%
Government agencies	7.8%	86.4%	5.8%	13.0%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

5.4.7.1 Sources of ideas and information for innovation based on winery size

Sources of ideas and information for innovation that are significant based on winery size (Table 5.42) were found to be new staff (Sig. = .001), existing staff (Sig. = .026), other businesses within the same business group (Sig. = .049), suppliers (Sig. = .0090), competitors and other businesses within the same industry (Sig. = .014), businesses from other industries (Sig. = .040), literatures from the Internet (Sig. = .003), industry or employer organisations (Sig. = .003), Crown Research institutes (Sig. = .008) and Government agencies (Sig. = .000).

Table 5.42: Sources of ideas and information for innovation based on winery size

Source	Yes	No	Don't know	F	Sig.
New staff (appointed in the last 2 years)	32.0%	64.1%	3.9%	6.975	.001
Existing staff	52.4%	45.6%	1.9%	1.365	.026
Other businesses within the business group (e.g. subsidiaries or parent companies)	14.6%	82.5%	2.9%	3.688	.049
Customers	31.1%	65.0%	3.9%	1.698	.188
Suppliers	30.1%	68.0%	1.9%	4.940	.009
Competitors and other businesses from the same industry	33.0%	63.1%	3.9%	4.460	.014
Businesses from other industries (not including customers or suppliers)	20.4%	74.8%	4.9%	3.313	.040
Professional advisors, consultants, banks or accountants	27.2%	68.9%	3.9%	9.318	.000
Books, journals, patent disclosures or the Internet	29.1%	65.0%	5.8%	6.326	.003
Wine shows, festivals or conferences	22.3%	71.8%	5.8%	1.784	.173
Industry or employer organisations	19.4%	74.8%	5.8%	6.174	.003
Universities or polytechnics	11.7%	83.5%	4.9%	1.498	.229
Crown Research Institutes, other research institutes	6.8%	88.3%	4.9%	5.104	.008
Government agencies	7.8%	86.4%	5.8%	15.621	.000

Significance is measured at the .05 level.

5.4.8 Activities to support innovation

There was a relative lack of activities undertaken to support innovation amongst respondents. When compared against the 2007 New Zealand innovation averages (Table 5.43), the main activities listed that were done in support of innovation were the acquisition of new computer hardware or software and the design of product labelling which were both at 18.4 per cent, with the acquisition of new computer hardware or software well below the national averages of 46 per cent and 38 per cent respectively (Statistics New Zealand 2007). The figures reported for design tended to reflect these averages with 17 per cent of activities in this area undertaken to support innovation and seven per cent were not. The introduction of new varieties of grapes and viticultural techniques were both reported as being undertaken by only 16.5 per cent of those who were surveyed. Marketing the introduction of new goods and services (15.5 per cent) along with the purchasing of new machinery and equipment (15.5 per cent) were noted as having been done to support innovation, but still fell short of the 2007 New Zealand innovation averages by comparison (Statistics New Zealand 2007). The results suggest some resistance from wineries towards activities supporting innovation.

The underlying theme regarding innovation in the 2010 survey was that unless there was a proven track record for an innovative process which could enhance the managerial and organisational objectives of the wineries involved (OECD et al. 2005; Yuan et al. 2006), or provide more efficient organisational and marketing objectives through product innovations (OECD et al. 2005; Hjalager 2009), then wineries tended to avoid innovation to a degree. This may help explain why there appears to be a cautious approach within the industry, particularly towards areas such as the adoption of sustainable methods of wine production. This could be combated through SWNZ introduced agent assistance programmes (Bessant et al. 2009) relating to sustainable methods; and could address this perceived gap in innovation capability within the

New Zealand wine industry where “firms may have a general awareness of the potential of the innovation on offer but do not see its relevance or applicability to them” (Bessant et al. 2009: 7).

Table 5.43: Activities to support innovation

Activity	Done to support innovation	Done, though not to support innovation	Not Done	Don't know	Done to support innovation (NZ Average 2007)	Done, though not to support innovation (NZ Average 2007)
Introduce a new variety of grape	16.5%	1.9%	62.1%	19.4%	-	-
Use of new viticultural techniques	16.5%	13.6%	45.6%	24.3%	-	-
Acquire new machinery and equipment	15.5%	12.6%	52.4%	19.4%	29.0%	38.0%
Acquire new computer hardware and software	18.4%	20.4%	45.6%	15.5%	38.0%	46.0%
Acquire other knowledge (e.g. outsourcing for new techniques or intellectual property)	13.6%	6.8%	64.1%	15.5%	14.0%	6.0%
Implement new business strategies or management techniques	16.5%	10.7%	48.5%	24.3%	35.0%	33.0%
Implement organisational restructuring	7.8%	7.8%	53.4%	31.1%	22.0%	31.0%
Design (e.g. graphic design on labelling of bottles)	18.4%	7.8%	44.7%	29.1%	17.0%	7.0%
Market the introduction of new goods and services	15.5%	3.9%	50.5%	30.1%	33.0%	20.0%
Market research	9.7%	11.7%	47.6%	31.1%	20.0%	16.0%
Significant changes to existing marketing strategies	14.6%	12.6%	44.7%	28.2%	17.0%	17.0%
Employee training	13.6%	20.4%	38.8%	27.2%	38.0%	51.0%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

5.4.8.1 Activities to support innovation based on winery size

All activities to support innovation (Table 5.44) were classed as being significant regardless of the size of the winery concerned at the .05 significance level.

Table 5.44: Activities to support innovation based on winery size

Activity	Done to support innovation	Done, though not to support innovation	Not Done	Don't know	F	Sig.
Introduce a new variety of grape	16.5%	1.9%	62.1%	19.4%	8.000	.000
Use of new viticultural techniques	16.5%	13.6%	45.6%	24.3%	5.856	.000
Acquire new machinery and equipment	15.5%	12.6%	52.4%	19.4%	6.303	.001
Acquire new computer hardware and software	18.4%	20.4%	45.6%	15.5%	3.452	.019
Acquire other knowledge (e.g. outsourcing for new techniques or intellectual property)	13.6%	6.8%	64.1%	15.5%	3.462	.019
Implement new business strategies or management techniques	16.5%	10.7%	48.5%	24.3%	5.659	.001
Implement organisational restructuring	7.8%	7.8%	53.4%	31.1%	13.755	.000
Design (e.g. graphic design on labelling of bottles)	18.4%	7.8%	44.7%	29.1%	7.325	.000
Market the introduction of new goods and services	15.5%	3.9%	50.5%	30.1%	8.556	.000
Market research	9.7%	11.7%	47.6%	31.1%	2.928	.038
Significant changes to existing marketing strategies	14.6%	12.6%	44.7%	28.2%	4.814	.0041
Employee training	13.6%	20.4%	38.8%	27.2%	3.382	.021

Significance is measured at the .05 level.

5.5 Cooperative arrangements

Cooperative arrangements for the purposes of this survey were based on the Statistics New Zealand (2009) definition whereby such arrangements mean active participation with another organisation or individual for the purpose of innovation.

5.5.1 Cooperative arrangements for the purpose of innovation

Out of the 56 respondents who replied to this section in the survey, only 27.2 per cent of these wineries reported having cooperative arrangements in place that were for the purpose of innovation during the two years leading up to the 2009 financial year.

5.5.2 Businesses or institutions that wineries engaged in cooperative arrangements with

In terms of the businesses or institutions that were engaged in cooperative arrangements with New Zealand wineries (Table 5.45), within New Zealand itself competitors and other businesses within the local wine industry were first (18.4 per cent), followed by customers (12.6 per cent) and suppliers (10.7 per cent). Universities or polytechnics were the leading source of institutional support (7.8 per cent). These were all above the 2007 New Zealand national innovation averages in each case.

Overseas cooperative arrangements for New Zealand wineries were mainly with customers at 8.7 per cent, and above the New Zealand innovation average reported in 2007 of two per cent in this category. Some respondents did state that they had arrangements with Universities or polytechnics that were not New Zealand based (4.9 per cent) which was well above the 2007

New Zealand innovation average of just one per cent, and this indicates that there is some degree of collaboration occurring outside of the New Zealand wine industry with offshore institutions in an attempt to build on existing industry knowledge. This supports the idea put forward by Marshall and Shaw (2000) that collaboration and learning are recognised as key factors in the success of Australian wine tourism clusters, and it would appear that there is a desire to replicate this within the New Zealand wine industry based on this evidence. Other businesses within the same business group (e.g. subsidiaries and parent companies) were the least likely to have cooperative arrangements in place (23.3 per cent) with those who were surveyed, which is below the 2007 national average of 6 per cent.

Table 5.45: Businesses or institutions that wineries have cooperative arrangements with

Type of business or institution	NZ	Located in NZ National Average 2007	Overseas	Located Overseas NZ National Average 2007	No cooperation
Customers	12.6%	9.0%	8.7%	2.0%	13.6%
Suppliers	10.7%	10.0%	1.9%	4.0%	16.5%
Businesses from other industries	8.7%	6.0%	2.9%	1.0%	18.4%
Competitors and other businesses from the same industry	18.4%	8.0%	1.0%	2.0%	15.5%
Other businesses within the business group (e.g. subsidiaries or parent companies)	3.9%	6.0%	1.0%	3.0%	23.3%
Universities or polytechnics	7.8%	3.0%	4.9%	1.0%	20.4%
Crown Research Institutes, other research institutes, or research associations	6.8%	3.0%	1.9%	1.0%	20.4%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

5.5.3 Activities where wineries engaged in cooperative arrangements

For wineries engaged in cooperative arrangements, Table 5.46 illustrates that joint training was the main activity undertaken (49.5 per cent), followed by joint marketing or distribution (40.6 per cent). Joint production was third at 19.0 per cent, while joint prototype development recorded only 8.9 per cent. This suggests that, as Thomas (2005) states, cooperation between businesses within an industry is not always assured; participants can refuse to share what in their view is their intellectual property for fear that this may impact on their competitive advantage,

Table 5.46: Activities where wineries engaged in cooperative arrangements

Activity	Yes	No
Joint marketing or distribution	40.6%	59.4%
Joint production	19.0%	81.0%
Joint research and development	18.6%	81.4%
Joint prototype development	8.9%	91.1%
Joint training	49.5%	50.5%
Other	3.8%	96.2%

5.5.4 Reasons for engaging in cooperative arrangements

The main reason given for engaging in cooperative arrangements (Table 5.47) was in order to share costs (32 per cent), followed by the desire to spread risk (16.5 per cent). Access to research and development ranked third at 13.6 per cent, while the potential access to new markets was given as a reason by 11.7 per cent of those surveyed. Access to financial resources and new suppliers were amongst the least likely reasons to engage in such arrangements (both of these reasons were cited by only 1.9 per cent of respondents).

These reasons, although recording significantly lower percentages, were similar to the pattern which emerged based on the 2007 New Zealand and agricultural sector averages listed in Table 5.5.3. However it has to be noted that the agricultural averages in 2007 cited the third most important reason as being access to work practices (44 per cent), which at 2.9 per cent in the

2010 survey is very low by comparison, and access to new markets was seen as the most important reason to engage in cooperative arrangements based on the 2007 national average of 43 per cent, and not the ability to share costs which was primary reason in the 2010 survey.

These findings suggest that through sharing both costs and risk that the aversion towards failure which has been previously noted in the results of the innovation section of this study also carry through into New Zealand wineries' views of cooperation and collaboration. It would appear that in order to overcome risk aversion respondents to the 2010 survey point towards the value of reciprocal arrangements within the wine industry (Hall et al. 1997; Szivas 1999; Telfer 2001a; Martin and Williams 2003; Centonze 2010; Kesar and Ferjani 2010) as these can help spread risk amongst multiple parties. The extent of the lack of cooperation reported by those who were surveyed in 2010 is remarkable given the emphasis placed in many publications as to the importance of cooperation in the wine industry (Tzimitra-Kalogianni et al. 1999; Gnoth 2002; Demhardt 2003; Simpson and Bretherton 2004; Di-Gregorio and Licari 2006; Alonso and Northcote 2008; Alonso 2012; Hojman and Hunter-Jones 2012).

Table 5.47: Reasons for engaging in cooperative arrangements

Reason	% of wineries	NZ National Average 2007	NZ Agricultural Average 2007
Sharing costs	32.0%	38.0%	59.0%
Spreading risk	16.5%	22.0%	41.0%
Access to research and development	13.6%	34.0%	41.0%
Access to production processes	9.7%	25.0%	36.0%
Access to management skills	5.8%	40.0%	36.0%
Access to new distribution channels	8.7%	28.0%	34.0%
Access to work practices	2.9%	33.0%	44.0%
Access to financial resources	1.9%	16.0%	28.0%
Access to new markets	11.7%	43.0%	36.0%
Access to new suppliers	1.9%	19.0%	31.0%
Other	1.5%	16.0%	10.0%

Source for New Zealand 2007 Averages: Statistics New Zealand 2007

5.6 Networks and cooperation

5.6.1 Organisations which wineries reported having relationships with

The main organisations which wineries reported having relationships with in 2010 (Table 5.48) for the purposes of cooperative marketing or promotion were Visitor Information Centres (10.7 per cent) followed by Business Development Boards (9.7 per cent) and Regional Tourism Organisations (7.8 per cent). The organisations that wineries stated that they had the most contact with were Local Councils (47.6 per cent) followed by Regional Councils (35.9 per cent). The least contact was with 100% Pure New Zealand (74.8 per cent) and the Ministry of Economic Development (69.9 per cent). The Tourism Industry Association of New Zealand (TIANZ) ranked third in terms of least contact at 68.9 per cent. Other industry organisations that New Zealand wineries reported as having relationships with included restaurant associations, Biodynamic/Organic, Central Otago Pinot Noir, COWA and the Slow Food Movement. No data was available for this question from the 2003 survey; however in the 1997 survey wineries 70 per cent of producers had some form of contact with Visitor Information Centres, while 63 per cent have contact with a Regional Tourism Organisations.

These results support the view of Schrieber (2004) that substantial issues exist in terms of communication and political issues within the New Zealand wine industry. The number of wineries who indicated that they have no form of relationship with national organisations who claim to represent their views is of concern, and suggest that there is a degree of cynicism prevalent within the industry as to the effectiveness of these organisations. Hall and Mitchell (2004) noted the need for further research into how the policies and actions of governing bodies impact on wine clusters and networks within New Zealand, and the results of the 2010 survey add further urgency to this need.

Clear gaps appear to exist within the information exchange process (Hall & Johnson 1998) due to the lack of alliances apparent in Table 5.48 between wineries and some of the leading New Zealand wine industry organisations. At the local level however, there is a definite contrast with both local and regional councils being viewed as important by respondents, which bodes well in terms of forming coherent future regional wine tourism campaigns. The New Zealand wine industry could clearly benefit from what Telfer (2001a) describes as intensified levels of collaboration between wineries and other like-minded businesses, particularly in areas such as food tourism.

Table 5.48: Organisations which New Zealand wineries have relationships with 2010

Organisation	Type of relationship (2010)						
	None	Contact as required	Member	Cooperative marketing or promotion	Member and cooperative marketing or promotion	Cooperative marketing or promotion and contact as required	Other relationship
Tourism New Zealand	65.0%	20.4%	3.9%	6.8%	-	-	3.9%
Regional Tourism Organisation	43.7%	31.3%	16.5%	7.8%	-	7.8%	1.2%
New Zealand Winegrowers	25.2%	13.6%	56.3%	3.9%	-	-	1.0%
Sustainable Winegrowers New Zealand (SWNZ)	15.5%	15.5%	62.1%	5.8%	-	-	1.0%
NZGVIG	66.0%	8.7%	17.5%	1.0%	-	-	6.8%
Regional Grape Growers Association	35.0%	12.6%	42.7%	6.8%	-	-	2.9%
NZ Society of Viticulture and Genology	57.3%	17.5%	18.4%	1.0%	-	-	5.8%
Regional Wine Organisation	34.0%	14.6%	41.7%	6.8%	-	-	2.9%
Visitor Information Centres	45.6%	30.1%	13.6%	10.7%	-	-	-
Tourism Industry Association of New Zealand	68.9%	17.5%	4.9%	6.8%	-	-	1.9%
100% Pure New Zealand	74.8%	14.6%	2.9%	6.8%	-	-	1.0%
Business Development Boards	65.0%	14.6%	9.7%	9.7%	-	-	1.0%
Local Council	42.7%	47.6%	7.8%	1.9%	-	-	-
Regional Council	53.4%	35.9%	5.8%	2.9%	-	-	1.9%
Trade And Industry New Zealand	47.6%	32.0%	5.8%	6.8%	-	-	7.8%
Chamber of Commerce	62.1%	23.3%	10.7%	-	-	-	3.9%
Ministry of Economic Development	69.9%	20.4%	1.9%	3.9%	-	-	3.9%
Other Central Government Agencies	66.0%	22.3%	3.9%	3.9%	-	-	3.9%
Hospitality Associations	55.3%	26.2%	13.6%	2.9%	-	-	1.9%
Local food and wine promotion group/network	55.3%	22.3%	17.5%	4.9%	-	-	-

5.7 Tourism and Marketing

5.7.1 Wine and food festivals

As respondents could attend more than one festival, there were multiple responses to this question, and these added to more than 100 per cent. Out of the 107 responses to this question, 28 per cent of wineries surveyed did not attend a wine or food festival (an increase of 7.8 per cent on the 2003 figure of 20.2 per cent). The Akaroa French Festival was cited as the festival which most respondents attended (27.2 per cent), with the Bay of Islands Jazz and Blues Festival ranked second with 10.7 per cent attendance. Third equal were the BMW Marlborough Festival, the Canterbury Wine and Food Festival and the Bluff Oyster and Southland Seafood Festival with 4.9 per cent each. The festival which attracted the most attendees (19.2 per cent) in 2003, Harvest Hawkes Bay, only recorded 3.9 per cent attendance in the 2010 survey.

Of the 11.7 per cent who chose the category 'Other' in response to this question, festivals not listed in the 2010 survey that these wineries reported taking part in were Wanaka Fest, The Food Show (Auckland and Wellington), Clyde Easter Festival 2010, the Brightwater Wine and Food Fair, Pinot 2010 (Wellington), Unique and Boutique (Wellington), Gibbston Harvest Festival, Warbirds over Wanaka, Old Cromwell Town Wine Festival, St. Bathans Wine and Food Festival, Ranfurly Wine and Food Festival, Timaru Wine and Food Festival, Pinot Celebration, Matakana Sunday Winemakers, Taste of Tarras, and the Oamaru Wine and Food Festival.

Unfortunately no data was available for this question from the 2003 survey. The 1997 survey however reported that 63 per cent of producers had only attended one festival during the past twelve months, 35 per cent attended between two and six festivals, and very few (2 per cent) attended more than six festivals.

With over 40 festivals held in New Zealand annually (Winetitles 2009), wine festivals have grown in New Zealand to become an important vehicle for both the promotion of wineries and creating awareness of their products. This growth points towards the value which visitors see wine festivals providing in terms of not only entertainment, but also education as well (Getz 2000). Another vital role that wine festivals play occurs in making festival attendees aware of individual wineries, which may in turn translate into visitation of these wineries in the future (Houghton 2001, 2002). Scenic locations are also an important part of wine festivals (Hall and Johnson 1998; Cambourne et al. 2000; Frochot 2000; Hall et al. 2000; Taylor & Shanka 2002; Christensen et al. 2004; Hall & Sharples 2008), and festivals held in New Zealand are no exception in this regard. Making the most of destination attributes (Charters & Ali-Knight 2002; Getz & Brown 2006) has become a point of differentiation as festivals position themselves within the market.

5.7.2 Winery attributes

As seen in Table 5.49, and based solely on the responses that fell into the extremely important or very important categories, the quality of the wines (85.3 per cent), personalised and friendly service (79.2 per cent), and the whole experience (77.5 per cent) were the most important attributes according to respondents. The least important attributes were food (32.5 per cent), surprisingly the winery itself (35.8 per cent), and meeting the winemaker (41.2 per cent). Other attributes that respondents cited as important were the type of music that was played at their winery, supplying visitors with an educational experience, and possessing an international reputation.

The results from the 2010 survey show a contrast with the results of the 2003 survey which saw personalised and friendly service (93.7 per cent), the whole experience (90.7 per cent) and the quality of wines (90.1 per cent) judged as the either extremely important or very important by

respondents, while food (38.6 per cent), meeting the winemaker (29.9 per cent) and wine awards received (28.8 per cent) were viewed as the least important attributes.

5.7.3 Regional attributes

Regional attributes were also ranked based solely on the responses that fell into the extremely important or very important categories in the 2003 and 2010 surveys (Table 5.50). This saw the quality of wines (80.7 per cent) rank as the most important attribute, while the prestige or character of a district and the scenery of the region both tied at second equal with 70.7 per cent each. In third place was the proximity to a major city or destination (58 per cent). The least important attributes were the size of the region (35 per cent) or whether the region had festivals or events (34.1 per cent). Other attributes listed by respondents as important were wine trail participation and involvement, being open seven days a week, and having a reputation for quality wines.

Previous rankings for regional attributes in the 2003 survey rated the quality of wines as the most important attribute (92.3 per cent) followed by the prestige or character of a district (80.9 per cent). The proximity to a major city or destination ranked third at 55.6 per cent, with proximity to Wellington and Auckland being cited as important (Christensen et al. 2004). Least important attributes were reported as the scenery of the region (48.8 per cent) and the size of the region (22.5 per cent). When the scenery attribute is considered in the context of being ranked as second place in the 2010 survey, this illustrates that there have been some significant changes in the regional attributes which respondents value the most.

Table 5.49: Winery attributes

Attribute	2003				2010			
	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response
Winery	37	67	55.2%	9	28	78	35.8%	11
Tasting area	53	75	70.66%	5	52	81	64.1%	6
Atmosphere and setting	60	78	76.92%	4	56	81	69.1%	4
Quality of wines	73	81	90.12%	3	70	82	85.3%	1
Wine awards received	21	73	28.77	12	38	81	46.9%	9
Knowledge of your wines	53	77	68.83%	7	50	81	61.7%	8
Personalised and friendly service	74	79	93.67%	1	65	82	79.2%	2
Meeting the winemaker	23	77	29.87%	11	33	80	41.2%	10
Food	27	70	38.57%	10	26	80	32.5%	12
Location	53	76	69.74	6	51	81	62.9%	7
Quality of the environment	n/a	-	-	-	52	80	65.0%	5
Whole experience	68	75	90.67	2	62	80	77.5%	3
Other	2	3	66.6%	8	8	62	12.9%	13

Table 5.50: Regional attributes

Attribute	2003				2010			
	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response
Prestige or character of the district	72	89	80.90%	2	58	82	70.0%	2 =
Quality of wines	84	91	92.31%	1	67	83	80.0%	1
Quality of the environment	-	-	-	-	39	82	47.5%	4 =
Other attractions and festivals	46	85	54.12%	5	39	82	47.5%	4 =
Festivals and events	43	86	50.00%	6	28	82	34.10%	6 =
Scenery	52	86	48.84%	7	58	82	70.0%	2 =
Size	18	80	22.5%	8	28	80	35.0%	7
Proximity to major city or tourist destination	50	90	55.56%	4	47	81	58.0%	3
Other	6	9	66.6%	3	4	9	44.4%	5

5.7.4 Information sources

5.7.4.1 Most important forms of media used to attract visitors

Based on those who responded with a 'yes' to the information sources listed in the 2010 survey (Table 5.51), websites were viewed as the most important form of media when it came to attracting visitors to wineries at 65.0 per cent. This was followed by word of mouth (64.1 per cent) and mailing lists (53.4 per cent). Guidebooks ranked fourth overall (49.5 per cent). Of note is that Tourism New Zealand ranked as the second least important form of media (15.5 per cent) followed by television at 11.7 per cent. This was a significant change in the information sources since the 2003 survey, where word of mouth was ranked first (98.7 per cent) followed by brochures (91.8 per cent) with websites in third place (88.7 per cent). In the 2010 survey brochures dropped from second position in 2003 to seventh position at 48.5 per cent. Other forms of media that were viewed as important by respondents were cited by respondents as branded winery literature, sponsorship of charity events, roadside signage, and restaurant advertising for their wine brand.

5.7.4.2 Most useful information sources

The usefulness of information sources was also questioned, and based on the responses in the extremely important or very important categories in the 2010 survey (Table 5.52), word of mouth ranked as the most useful (75.9 per cent) followed by having a mailing list (46.9 per cent). Visitor information sources ranked as the third most useful information source, while websites ranked fourth (39 per cent). The least valuable information sources were reported as magazines (.09%) followed by radio and television (both at .06 per cent). The results of the 2003 survey indicated a similar pattern with word of mouth the most useful (recording a very high percentage rating at 96.3 per cent), with mailing lists ranked second (65.71 per cent) and visitor information

sources ranked third (54.84 per cent). Least valuable information sources in 2003 were radio (10.64 per cent) and television (10.81 per cent) and Tourism New Zealand (26.42 per cent).

Table 5.51: Information sources

Source	2010					
	Extremely important	Very important	Somewhat important	Not very important	Not at all	Don't know
Wine shows	11.7%	7.8%	18.4%	10.7%	24.3%	5.5%
Wine and Food Festivals	6.8%	9.7%	19.4%	12.0%	24.3%	4.9%
Wine clubs	6.8%	9.7%	19.4%	12.6%	24.3%	3.9%
Retail trade	4.9%	16.5%	20.4%	9.7%	20.4%	5.8%
Tourism New Zealand	1.9%	6.8%	16.5%	16.5%	30.1%	6.8%
Local or Regional Organisation	6.8%	17.5%	24.3%	7.8%	20.4%	2.9%
Visitor information sources	8.7%	26.2%	19.4%	5.8%	16.5%	3.9%
Word of mouth	30.1%	31.1%	4.9%	1.9%	10.7%	1.9%
New Zealand Winegrowers	17.5%	20.4%	12.6%	3.9%	21.4%	4.9%
Magazines	1.9%	5.8%	28.2%	13.6%	26.2%	3.9%
Newspapers	2.9%	6.8%	11.7%	17.5%	34.0%	4.9%
Radio	1.0%	3.9%	5.8%	15.5%	41.7%	9.7%
Television	1.0%	3.9%	1.0%	14.6%	46.6%	9.7%
Website	14.6%	16.5%	22.3%	6.8%	16.5%	2.9%
Guidebooks	6.8%	15.5%	24.3%	6.8%	22.3%	3.9%
Internet Promotion	8.7%	7.8%	10.7%	10.7%	31.1%	8.7%
Online Social Media	6.8%	15.5%	9.7%	9.7%	28.2%	7.8%
Brochures	5.8%	16.5%	16.5%	5.8%	24.3%	6.8%
Other	1.9%	3.9%	1.0%	21.4%	33.0%	33.0%

Table 5.52: Media information sources and their perceived usefulness to wineries in 2010

Media source	2010			
	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response
Wine shows	20	80	25.0%	11
Wine and Food Festivals	22	82	26.8%	10
Wine clubs	17	80	21.2%	12 =
Retail trade	22	80	27.5%	9
Tourism New Zealand	9	81	11.1%	15
Local or Regional Organisation	25	82	30.5%	5
Visitor information sources	36	83	43.3%	3
Word of mouth	63	83	75.9%	1
New Zealand Winegrowers	15	81	18.5%	13
Mailing list	39	83	46.9%	2
Magazines	8	82	.09%	17 =
Newspapers	10	80	12.5%	14
Radio	5	80	.06%	16 =
Television	5	79	.06%	16 =
Website	32	82	39.0%	4
Guidebooks	23	82	28.0%	8
Internet Promotion	17	80	21.2%	12 =
Online Social Media	23	80	28.7%	7
Brochures	23	78	29.4%	6
Other	6	65	.09%	17 =

5.7.5 Tourism and your winery

5.7.5.1 Winery attitudes

Evaluating wineries' attitudes towards tourism (Table 5.53) produced some interesting trends. The perception that cellar door visitors do not buy much wine fell to the lowest level recorded across all three surveys, recording 23.3 per cent in 2010, which was a drop in 6.1 percentage points by those either agreeing or strongly agreeing with this statement from the 2003 survey. A decline was also noted in wineries' attitudes towards the value of tourists which fell by 4.9 percentage points from the 82.6 per cent in 2003 to 77.7 per cent. This figure however was still above that recorded in 1997 (65.5 per cent), and was also the statement which those surveyed either agreed or strongly agreed the most about in the 2010 results.

When asked whether tourism attracted a wide range of customers to their winery, 57.3 per cent either agreed or strongly agreed with this statement, marking a drop in 11.8 percentage points since 2003 where this figure had remained constant at 69.1 per cent with the result for this particular statement in the 1997 survey. Tourism was viewed as providing significant marketing opportunities by 58.2 per cent, which was also down by 11.2 percentage points on the figure recorded in 2003, while the impact of tourism on sales of wine offshore was viewed as being in decline, with a 9.8 percentage point fall from 2003 indicated by only 35.9 per cent either agreeing or strongly agreeing with this statement.

The question of whether tourism contributed greatly to their business success saw 29.2 per cent agree or strongly agree with this statement, marking a slight rise of less than a single percentage point on the figure of 28.5 per cent in 2003. The overall benefits of tourism were seen to outweigh the negative impacts by just over half of those surveyed at 54.4 per cent, and this had fallen sharply by 22.7 percentage points from 77.1 per cent in 2003 by those who either agreed or strongly disagreed with this statement.

63.1 per cent of those surveyed believed that tourism was important in terms of word of mouth promotion for their winery, while only 12.6 per cent either agreed or strongly agreed that tourism did not attract the kind of visitors that they wanted to their winery, which is a slight decrease from 13.3 per cent recorded in 2003, but when considered next to the figure recorded in 1997 of 21.7 per cent shows a 9.1 per cent decrease in agreement with this statement.

Christensen et al. (2004) suggest that in the 2003 survey there was an increasingly positive attitude towards wine tourism as a concept, and this can be said to be true in general for the 2010 survey, however this illusion of overwhelming positivity towards wine tourism from the supply side perspective appears to have been somewhat shattered in places. The perceived value of wine tourists for wineries appears to be declining as many New Zealand wineries struggle to stay afloat while the New Zealand dollar remains high against overseas currencies and production levels outstrip demand (Deliottes 2010). The fact that in 2010 there was 22 respondents who replied that they would have completed the survey but had either sold their business or exited the industry altogether in the twelve months prior to the survey underlines just how serious the current oversupply crisis within the New Zealand wine industry is. Even though it appears that at the cellar door the wine tourist still appears an attractive proposition in terms of sales, cynicism is evident through industry attitudes which state clearly that cellar door sales are less important to their businesses compared with the same figures in 2003.

Table 5.53: Winery attitudes towards tourism

Statement	1997 Strongly agree/ agree	2003 Strongly agree/ agree	2010 Strongly agree/ agree
Cellar door visitors do not buy much wine	25.9%	29.4%	23.3%
Tourists are valuable	65.5%	82.6%	77.7%
Tourism attracts a wide range of customers to my winery	69.1%	69.1%	57.3%
Tourism provides significant marketing opportunities	56.1%	69.4%	58.2%
Tourism positively impacts the sales of my wine offshore	n/a	45.7%	35.9%
Tourism does not contribute greatly to my business success	28.9%	28.5%	29.2%
The overall benefits of tourism outweigh the negative impacts	68.8%	77.1%	54.4%
Tourism increases awareness of my winery through word of mouth	n/a	n/a	63.1%
Tourism does not attract the kind of visitors I want to my winery	21.7%	13.3%	12.6%

5.7.6 Tourism and your region

Based on the responses of those who either strongly agreed or agreed to the statements in this section for the 2010 survey (Table 5.54) it was found that the most respondents agreed that tourism was important to the wine industry (42.7 per cent). Second highest ranked statement was that the promotion of tourism in a region brings more visitors to a winery (31.1 per cent), while third equal was shared between the statements that tourism should be actively encouraged in the wine industry and that the wine industry has much to offer the tourism industry (both on 30 per cent each). The least agreement was with the statement that the tourism industry has much to offer the wine industry (27.1 per cent). When similar statements were posed in the 2003 survey, there was strong agreement on the fact that respondents felt that the wine industry had a lot to offer the tourism industry (95 per cent), while the encouragement of regional tourism within the wine industry ranked second (92 per cent), followed by the tourism industry being import to the wine industry (91.2 per cent) which ranked first in the 2010 survey. In 2003 the least agreement was with the statement that promoting tourism brings more visitors to my winery (80.2 per cent).

Table 5.54: Tourism and your region

Statement	2003				2010			
	# stating strongly agree/agree	Total responses	% of total responses	Ranking based on % of response	# stating strongly agree/agree	Total responses	% of total responses	Ranking based on % of response
Tourism industry is important to the wine industry	94	103	91.2%	3	44	103	42.7%	1
Promoting tourism in the region brings more visitors to my winery	77	96	80.2%	5	32	103	31.1%	2
Tourism in the region should be actively encouraged in the wine industry	93	101	92.0%	2	31	103	30.0%	3 =
The wine industry has much to offer the tourism industry	97	102	95.0%	1	31	103	30.0%	3 =
The tourism industry has much to offer the wine industry	87	100	87.0%	4	28	103	27.1%	4

5.7.7 Tourism and your wine

5.7.7.1 Wine tourism and product/brand awareness

Compared with the previous two surveys, the responses received in 2010 (Table 5.55) indicate that wineries are mostly in agreement when asked if wine tourism enhances their product or awareness of their brand (24.3 per cent reported strongly agreeing with this statement while 43.7 per cent also stated that they agree.), however both of these percentages have fallen slightly based on the 1997 and 2003 figures. A higher level of uncertainty with regards to this statement (28.2 per cent) was reported than in prior surveys.

Table 5.55: Wine tourism enhances product/brand awareness

	1997	2003	2010
Strongly Agree	21.4%	25.8%	24.3%
Agree	51.0%	47.4%	43.7%
Unsure	17.3%	22.7%	28.2%
Disagree	10.2%	3.1%	1.0%
Strongly Disagree	0	1.0%	2.9%

5.7.7.2 Wine tourism and wine product differentiation

Table 5.56 shows that most wineries in 2010 were uncertain (38.8 per cent) when asked whether wine tourism helped to differentiate their wine from others. However, compared to the 1997 and 2003 surveys those who strongly agreed that wine tourism did aid with product differentiation rose to 20.4 per cent, which is a 10 percentage point increase from 10.4 per cent recorded in 2003. Those who disagreed with this statement declined sharply (4.9 per cent) from the levels of 23.5 per cent and 15.6 per cent and recorded in the 1997 and 2003 surveys respectively.

Table 5.56: Wine tourism helps to differentiate my wine from others

	1997	2003	2010
Strongly Agree	14.3%	10.4%	20.4%
Agree	34.7%	34.4%	32.0%
Unsure	27.6%	38.5%	38.8%
Disagree	23.5%	15.6%	4.9%
Strongly Disagree	0	1.0%	3.9%

5.7.7.3 Wine tourism and mail order sales

Table 5.57 shows that once again there was a high level of uncertainty expressed (46.6 per cent) in the 2010 survey towards whether wine tourism helped to develop mail order sales, and this had climbed by 20.6 percentage points from 26.0 per cent in 2003. Only 28.2 per cent agreed with this statement in 2010 compared with 36.7 per cent in 1997 and 41.7 per cent in 2003, which is a decline by 13.5 percentage points since the last survey in 2003.

Table 5.57: Wine tourism helps to develop mail order sales

	1997	2003	2010
Strongly Agree	14.3%	12.5%	10.7%
Agree	36.7%	41.7%	28.2%
Unsure	26.5%	26.0%	46.6%
Disagree	17.3%	15.6%	11.7%
Strongly Disagree	5.1%	4.2%	2.9%

5.7.7.4 Wine tourism and Internet based sales

A new question was added to the 2010 survey which asked whether those surveyed believed that wine tourism helped to develop Internet based sales (Table 5.58). 47.6 per cent were uncertain as to whether this was the case, while 31.1 per cent were in agreement and 7.8 per cent strongly agreed with this statement. 10.7 per cent disagreed that Internet sales were aided by wine tourism.

Table 5.58: Wine tourism helps to develop Internet based sales

	1997	2003	2010
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Strongly Agree	n/a	n/a	7.8%
Agree	n/a	n/a	31.1%
Unsure	n/a	n/a	47.6%
Disagree	n/a	n/a	10.7%
Strongly Disagree	n/a	n/a	2.9%

5.7.7.5 Wine tourism and customer education

Most respondents were in agreement that wine tourism helped to educate their customers (Table 5.59) in the 2010 survey (19.4 per cent strongly agreed and 37.9 per cent agreed with this statement). This follows a similar pattern to the results to this question from the 2003 survey, however there does exist a degree of uncertainty concerning this issue which was seen to rise by 13.2 percentage points from 20.8 per cent in 2003 to 34 per cent in 2010.

Table 5.59: Wine tourism helps to educate my customers

	2003	2010
Strongly Agree	17.7%	19.4%
Agree	52.1%	37.9%
Unsure	20.8%	34.0%
Disagree	7.3%	6.8%
Strongly Disagree	2.1%	1.9%

5.7.7.6 Tourism Promotion

Table 5.61 shows that based solely on the percentage of responses which fell into the extremely important or very important categories, the wine trail or road signage along with winery based events ranked first equal in 2010 (both on 48.5 per cent) as the most successful forms of promotion for attracting visitors to a particular area. This was followed by regional winery brochures (31.0 per cent) and regional tourist guides (26.2 per cent). The least successful tourist promotion for those who were surveyed in 2010 were holiday and travel shows (.04 per cent) tourism awards (10.6 per cent) and media familiarisation (11.7 per cent).

The same question in 2003 revealed that wine trail or road signage were also the most successful form of promotion (63.41 per cent), followed by regional winery brochures (55 per cent) and wine and food festivals (54.88 per cent). The least successful in 2003 were also holiday and travel shows media familiarisation and tourism awards, which follows the same pattern as the 2010 survey findings in relation to this topic.

When asked who should be primarily responsible for the promotion of wine tourism, those surveyed in 2010 (Table 5.60) thought that regional tourism organisations (53) should be, followed by individual wineries (29) and wine industry associations (21). This marks a change from the 2003 survey where although regional tourism organisations were cited as being primarily responsible (42), wine industry associations were second in this survey (28), with individual wineries being regarded as the least responsible for promoting wine tourism (17). The 1997 survey saw the primary responsibility for the promotion of wine tourism rest with wine industry associations (85) followed by individual wineries (72) and regional tourism associations (63).

Table 5.60: Primary responsibility for promoting wine tourism

	1997	2003	2010
Regional Tourism Organisations	63	42	53
Wine Industry Associations	85	28	21
Individual wineries	72	17	29

Table 5.61: Tourism promotions that are successful for attracting wine tourists

Tourism promotion	2003				2010			
	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response	# stating extremely important or very important	Total responses	% of total responses	Ranking based on % of response
Regional wineries brochure	44	80	55.0%	2	32	103	31.0%	2
Holiday and travel shows	2	71	2.82%	11	5	103	.04%	10
Wine and food festivals	45	82	54.88%	3	22	103	21.3%	4
Tourism awards	4	73	5.48%	10	11	103	10.6%	9
Media familiarisation	16	78	12.48%	9	12	103	11.7%	8
Public tastings	26	77	33.77%	5	17	103	16.5%	6
Wine exhibitions/shows	24	76	31.58%	6	16	103	15.5%	7
Regional tourist guides	25	80	31.25%	7	27	103	26.2%	3
Winery based events	40	78	51.28%	4	50	103	48.5%	1 =
Wine trail or road signage	52	82	63.41%	1	50	103	48.5%	1 =
Regional website	12	76	15.79%	8	20	102	19.6%	5

5.8 Chapter Summary

As the first longitudinal study of its kind in wine tourism research, the findings and subsequent discussion have revealed that there are many significant gaps in what is known about the character of the New Zealand wine tourist, and also of the industry itself. Of particular interest in these results are that this is the first time that innovation has been included in a wine tourism study anywhere in the world, and this shows the emergence of some interesting findings, particularly when considering winery size as a factor in the context of innovation.

Biosecurity and sustainability issues also show the some interesting results; the latter especially shows some resistance exists to New Zealand wine industry led initiatives such as the SWNZ scheme which appear to be running counter to a majority of beliefs of winery operators. In order to give an overview of this thesis and to see how these results have compared with the seven core research questions which this thesis was guided by, this study now turns to the some concluding remarks.

Chapter 6

Conclusion

This final chapter begins by providing an overview of this thesis before moving to review each of the seven research objectives (see Chapter 1) that guided this study in order to illustrate how this research has met each one of these objectives. Also included is an outline of some suggested directions for future research on wine tourism based on the research gaps that were indicated by the results of this study and subsequent discussion (refer Chapter 5). The chapter concludes by offering some opinions on the future of wine tourism within the context of the New Zealand wine industry.

6.1 Overview of thesis

6.1.1 Chapter 1

Chapter 1 stated the aim of this thesis, which was to provide a comprehensive overview of wineries' attitudes towards and perceptions of wine tourism in New Zealand. Also highlighted was the importance of this research in terms of understanding wine tourism in New Zealand from the supply-side perspective of the industry. As two editions of the New Zealand National Wineries' Survey had previously been conducted by Hall and Johnson (1997) and Christensen et al. (2004), and in order to judge whether there had been any significant changes in wineries' attitudes towards wine tourism in this time series, this study was based on a new 2010 edition of the survey, which included a combination of previously used questions, questions revised in light of previous results and changes in the New Zealand wine business environment, and new questions relating to biosecurity, sustainability and innovation.

The work noted that previous New Zealand wine tourism research had already focused on tourist demographic and psychographic information (Reid, 1990; Hall & Johnson, 1997; Christensen et al. 2004; Mitchell & Hall 2006). As well as covering this area, this thesis also focused on the potential issues raised within the realms of biosecurity (Hall, 2003b, 2005b; Christensen et al. 2004), sustainability (Gabzdylova et al. 2009), innovation, cooperation (Hall et al. 2003; Thomas 2005; Dana & Winstone 2008; Alonso 2010; Dana et al. 2011) networks (Hall & Johnson 1997; Christensen et al. 2004; Dana & Winstone 2008; Dana et al. 2011) and tourism and marketing. The key theoretical contribution that this thesis makes to the existing body of literature on wine tourism concerns the area of innovation as it relates to the New Zealand wine industry which, as far as can be determined, is the first time that this had been incorporated into a survey on wine tourism anywhere in the world.

As this study was part of a longitudinal time series survey of New Zealand wine tourism (Hall & Johnson 1997; Christensen et al 2004) this chapter recognised the value of such an approach to enable comparisons (Getz 1994; Tassiopoulos et al. 2004; Burgess et al. 2005). The value of such longitudinal studies was noted as being often advocated within wine and tourism research but are rarely carried out (Jamal & Getz 1995; Decrop et al. 2004; Rindfleisch et al. 2008).

The aims of this research were then discussed leading to the formulation of the seven core research questions which guided this thesis, and these were outlined before a review of relevant international and New Zealand based wine tourism research was conducted in the subsequent chapters.

6.1.2 Chapter 2

Chapter 2 reviewed international wine tourism research and found that from an international perspective it is apparent that wine tourism offers substantial opportunities in terms of growth for businesses who wish to engage with their customers directly. Forms of direct dialogue with wine

tourists were seen to not only be able to be created at the cellar door, but also through participation in wine and food festivals and events. These opportunities not only represented a chance for wineries to expand their existing market, but also aided in networking and cooperation. However, challenges were noted as needing to be addressed in terms of the issues that this direct contact creates, particularly in the area of biosecurity.

6.1.3 Chapter 3

Chapter 3 focused on New Zealand based wine tourism research, and identified that there were some significant knowledge gaps which exist within the present body of New Zealand wine tourism research. Further research was highlighted as being needed in order to clearly define what destination attributes the typical wine tourist found attractive for an enjoyable winery experience so this could provide both direction and vision to the business strategies for New Zealand wineries who engage in wine tourism. Further research opportunities were also noted as existing in terms of surveying wine tourists at the cellar door to ascertain exactly what motivates visitation, while significant knowledge gaps were also seen to exist concerning biosecurity, sustainability and innovation and their relationship with dimensions of wine tourism.

6.1.4 Chapter 4

This chapter outlined the methodology which was used in this study. Although a number of questions asked in previous wine tourism surveys were retained, new questions were asked with respect to biosecurity, innovation and sustainability. So far as can be ascertained this is the first New Zealand or international study to provide such an extensive longitudinal analysis of wine tourism at a national scale.

6.1.5 Chapter 5

Chapter 5 revealed and discussed the findings of this study, and went on to compare these findings with the results in the 1997 and 2003 surveys. As the first longitudinal study of its kind in wine tourism research, the findings and subsequent discussion noted that there are many significant gaps in what is known about the New Zealand wine tourist, and the New Zealand wine industry. Biosecurity and sustainability issues also showed some interesting results; the latter especially showed some resistance exists to New Zealand wine industry lead initiatives, such as the SWNZ scheme, which appear to be running counter to the beliefs of a majority of winery operators. Added weight was also provided in the innovation section through comparing this set of findings with the 2007 New Zealand national innovation averages as well as the 2007 New Zealand agricultural averages (Statistics New Zealand 2007), which is the first time that this has been done in a wine tourism research study. This showed the emergence of some interesting findings, particularly when considering winery size as a factor in the context of innovation. It should be stressed that there are no results for innovation in the New Zealand tourism industry as tourism is not a sectorial classification.

6.2 Research Conclusions

The seven core research questions which guided this thesis will be viewed in the light of the results of this study.

6.2.1 Significant changes in New Zealand wineries' attitudes towards wine tourism since the last National Wineries' Survey in 2003

There have been some significant changes since the 2003 survey. A noticeable decline in cellar door sales coupled with industry skepticism towards the importance of cellar door sales revealed that the potential opportunities that could be available appear to be undervalued by winery owners. The perception that cellar door visitors do not buy much wine actually fell to the lowest level it had

recorded across all three surveys, so clearly the cellar door still represents a viable source of revenue for wineries. In terms of the characteristics of wineries who do offer cellar door sales, it was of particular interest to note that the ownership status and the age of the winery were both significant factors, while the actual size of the winery was not a significant characteristic.

On a positive note it appears that many wineries have decided to encourage greater use of their tasting room facilities for wine tourists through a declining trend is noticed in the charging of tasting room fees across the survey time series. This would suggest that there is a desire on the part of winery owners to not only encourage direct purchases of wine, but also to encourage repeat visitation (Madonna 1999). Cellar door experiences can help customers to overcome their resistance to purchasing unknown brands (Dodd 1995) and encourage what is termed as the “multiplier effect” (Bruwer et al. 2012: 57) amongst visitors who may then go on to refer other friends and family to also visit the winery concerned (Maddern & Golledge 1996; Paterson 2000; Jayawardena et al. 2008). The distinct increase in the level of company branded promotional material and regional merchandising available also supported the view that wineries were very interested in the promotion of positive memories and recollections of the cellar door in the post-visit experience (Barber et al. 2008; Hall & Mitchell 2008).

In general the positive attitude towards wine tourism that was cited by Christensen et al. (2004) in the 2003 survey appears to still be prevalent, with the majority of New Zealand wineries agreeing that tourism was important to the wine industry, and that if promoted correctly could bring more visitors to their winery. A decline however was noticed in wineries’ attitudes towards the value of tourists, although tourism was still seen to be providing significant marketing opportunities, and helped New Zealand wineries to enhance awareness of both their products and brands.

6.2.2 New Zealand wineries' participation in innovation

Unless there was a proven track record for an innovative process which could enhance the managerial and organisational objectives of the wineries involved (OECD et al. 2005; Yuan et al. 2006), or provide more efficient organisational and marketing objectives through product innovations (OECD et al. 2005; Hjalager 2009), then New Zealand wineries appeared to have a cautious approach towards innovation, particularly in the adoption of sustainable methods of wine production. However, for those wineries who did participate in innovation, the reasons given based on winery size that were significant were to increase productivity, to reduce energy consumption, and to reduce environmental impact.

6.2.3 New Zealand wineries and the risk from potential biosecurity threats

The area of greatest concern here appears to be the high level of uncertainty amongst respondents as to whether or not they believed that they currently had an effective strategy in place to deal with potential biosecurity threats. There is a gap in the knowledge of wineries towards the potential dangers presented by biosecurity threats due to a lack of adequate information sharing by those responsible for the governance of biosecurity protocols (Hall 2003; Renton et al. 2009). With almost a third of New Zealand wineries reporting that visitors were able to wander freely amongst the vines when they visited a New Zealand winery it appears that the attitude towards risk mitigation requires a more cautious approach underpinned by a higher level of awareness with regard to the consequences that a disease outbreak could have for the New Zealand wine industry.

6.2.4 New Zealand wineries views on the importance of environmental attributes for attracting increased visitation

Environmental attributes that were seen as important by New Zealand wineries saw the quality of wines rank as the most important attribute, while the prestige or character of a district and the scenery of the region were judged equal as the next most important attributes. This was followed by the proximity to a major city or destination, while the least important environmental attributes were the size of the region or whether the region had festivals or events. Other attributes that were viewed as important were wine trails, being open for seven days a week, and having an international reputation for quality wines. Destination attributes were also been noted as important in attracting attendees to wine and food festivals (Telfer 2003; Hall & Sharples 2008; Hashimoto & Telfer 2008; Rivera Jr. et al. 2009; Lee & Arcodia 2011; Axelson & Swan 2012; Kruger et al. 2012).

In terms of environmental issues, leading reasons for the employment of sustainable methods were found to be the reduction of environmental impacts, the reduction of costs and the improvement of productivity. Attracting wine tourists, and in turn also seeking to increase revenue through openly advocating sustainability, were not viewed by wineries as motivating factors to adopt these methods, which runs contrary to the notion that some innovative practices are an important dimension in the context of the tourist destination experience (Sørensen 2001; Stamboulis et al. 2003). However, it has to be noted that when it came to the reasons why wineries implemented innovation, the results from the 2010 survey did show that reducing energy consumption was an area where New Zealand wineries really stood out with a 46.7 per cent stating that this was motivating factor. This compared very positively with the 2007 New Zealand innovation average which was only 26 per cent (Statistics New Zealand 2007) and the New Zealand agricultural sector average, which at 17 per cent (Statistics New Zealand 2007), was less than half that of the 35 per cent reported by wineries. This suggests that while wineries

may view innovation in terms of environmental attributes as important in some regards, from the perspective of the wine tourist or even consumer this may not be not a key reason for visitation. This is another finding which runs counter to the marketing strategies of a number of wine brands (Hall & Mitchell 2008).

Over half of the respondents in the 2010 survey were in agreement with the fact that sustainability practices were important for the New Zealand wine industry. In contrast to the position of Wine New Zealand though, over half of the respondents did not believe that sustainability practices provided wineries with a source of competitive advantage. From the evidence presented within this study it is apparent that there are some significant issues at play within the New Zealand wine industry in terms of the adoption of sustainable winegrowing methods. There appears to be a very real risk that even with the full implementation of the SWNZ scheme in 2012 there will be a considerable backlash from some wineries towards the scheme. This could serve to create a division within the industry itself as the policies advocated by SWNZ are implemented by some but rejected in others. This also runs counter to one of the strategic aims of SWNZ – to have all New Zealand wineries participating in this scheme. It appears from the findings presented here that the implementation of SWNZ has actually alienated sections of the New Zealand wine industry, and this appears to draw a question mark over whether this scheme is in keeping with the current political, financial and ecological context that the New Zealand wine industry currently inhabits.

6.2.5 Increases in the amount of activities on offer aimed at wine tourists since 2003

The perceived importance of providing wine tourists in New Zealand with a unique experience through differentiation based on the services offered (Dodd & Gustafson 1997; Charters & O'Neill 2000, 2001; O'Neill & Charters 1999, 2000; O'Neill & Palmer 2004; Telfer 2001a; Pan et al. 2008) and the overall service quality has risen in the New Zealand wine industry over the

seven years since the 2003 survey was conducted. The increase in the number of restaurants in the 2010 survey reflects that food has also become a real drawcard in combination with the wine tourism experience. Educational aspects were also seen as important through providing services such as winery tours and wine tasting (Kendziorek 1994a, b, c, d; O'Neill & Charters 1999, 2000; Charters & O'Neill 2000, 2001; Dodd & Beverland 2001; Pan et al. 2008; Lockshin & Knott 2009) which have remained prominent throughout the survey time series as New Zealand wineries seek to engage with their visitors and influence their winery experience through service quality.

Expanding the range of facilities which wineries offer is being used as a way to motivate winery visitation (Getz 2000; Lang Research 2001; Brown & Getz 2005; Schiefer & Fischer 2008; Brown & Smith 2010) with a clear aim of not only meeting but exceeding the expectations of visitors in order to encourage repeat visitation (Madonna 1999; Charters & O'Neill 2001) to New Zealand wineries and increase cellar door sales (Dodd 1995; King & Morris 1997b; Hills 1998; Travers 1999; O'Neill, Palmer, & Charters 2002; Alonso et al. 2008; Vlachvei & Notta 2009; Bruwer et al. 2012).

There would appear that there are some gaps in the market which need to be accounted for however. The fact that there is clearly a growing demand for wine tourism within those in the 18-29 year age group shows that there needs to be more promotion aimed at encouraging growth within this demographic through emphasising the social and leisure aspects of wine tourism (Treloar et al. 2004). This can be done particularly through events such as wine and food festivals and concerts (Telfer 2003; Hall & Sharples 2008; Hashimoto & Telfer 2008; Rivera Jr. et al. 2009; Lee & Arcodia 2011; Axelson & Swan 2012; Kruger et al. 2012), specifically aimed to encourage and grow this future generation of wine tourists represented by the Generation Y market (Beverland 2001; Treloar et al. 2004; Fountain 2011; Fountain & Charters 2010).

6.2.6. Increases in the knowledge possessed by New Zealand wine tourists since 2003

Visitor market segmentation figures based on the tripartite typology devised by Hall (1996) indicated that most New Zealand wineries in the 2010 survey perceived the majority of their visitors (62.4 per cent) to be 'Wine interested' followed by those visitors who were categorised as being a 'Wine lover' (29.7 per cent), while those who were regarded as 'Wine curious' ranked third at 10.2 per cent. The same trend applied in the 2010 survey to the 2003 survey, so this shows that wine tourists are not necessarily more knowledgeable than they were in 2003. However, there has been a noted increase in the importance placed by New Zealand wineries on educating wine tourists in tasting rooms (Kendziorek 1994a, b, c, d; O'Neill & Charters 1999, 2000; Charters & O'Neill 2000, 2001; Dodd & Beverland 2001; Pan et al. 2008; Lockshin & Knott 2009) and the rise in educational opportunities represented by wine and food festivals (Yuan et al. 2004; Hashimoto & Telfer, 2006; Poisson & Chen 2010; Axelson & Swan 2012), which clearly appears to be aimed at turning those visitors who are 'Wine interested' into visitors who in the future could be classified as a knowledgeable 'Wine lover'.

6.2.7 New Zealand wineries' engagement with other businesses

New Zealand wineries' views on cooperation and collaboration indicated a low level of engagement with other businesses. These findings appeared to suggest that through sharing both costs and risk that the aversion towards failure was a major obstacle to wineries engaging with other businesses. In order to attempt to overcome this apparent risk aversion, respondents to the 2010 survey highlighted the value of reciprocal arrangements within the wine industry (Hall et al. 1997; Szivas 1999; Telfer 2001a; Martin and Williams 2003; Centonze 2010; Kesar and Ferjani 2010) for spreading risk. The overall extent of the lack of cooperation reported by those who were surveyed in 2010 was however in direct contrast to the emphasis placed in many publications with

regard to the importance of cooperation in the wine industry (Tzimitra-Kalogianni et al. 1999; Gnoth 2002; Demhardt 2003; Simpson and Bretherton 2004; Di-Gregorio and Licari 2006; Alonso and Northcote 2008; Alonso 2012; Hojman and Hunter-Jones 2012).

6.3 Directions for future research

This study has suggested that there are many gaps with the knowledge of the wine industry regarding what characteristics define a wine tourist. Substantial opportunities for further research exists that could aid to help inform the business strategies of New Zealand wineries in order to help increase revenue from wine tourism related activities.

In terms of wine tourism and marketing aspects, opportunities are present in terms of cellar door studies which build on previous surveys in this area (Getz & Brown 2006; Mitchell & Hall 2006; Cohen & Ben-Nun 2009) that help to define the characteristics of visitors and their motivations for winery visitation. It was also noted that in terms of wine tour groups that travel companies were placing less value on wine tourism with less travel companies incorporating wineries in their itinerary in the 2010 survey. In order to maintain the growth of wine tourism promotion of winery activities, New Zealand travel companies need to be engaged in collaborative arrangements with wineries. This decline could also be the result of smaller wineries within the survey sample simply not having the means to deal with large tour groups; although in order to determine if this is the problem, further research into this area is needed to see whether winery size is an issue.

The most significant research gaps indicated by this study in terms of the wine tourism context are in the areas of biosecurity and sustainability where given the importance of these environmental aspects to wine tourism, the wine tourism dimension in research in this area is not always to the forefront, particularly in the case of biosecurity where aside from prior research

(Christensen et al. 2004; Hall 2003b, 2005b) the lack of publications on wine tourism in this area reveals a not just a research gap, but a large void.

Sustainability studies are required which focus on the level of information sharing between organisations, as this survey recognised that there was a gap in this area. In terms of studies relating to wine tourism and innovation, it is envisaged that future research will be able to draw on the results of this survey for comparisons, particularly in terms of the lack of institutional support for innovation within the wine industry, which was noted as being an issue in this particular study. It is also hoped that this research may also encourage others to conduct winery surveys with respect to innovation rather than just rely on case study results, as useful as they may be.

Networks and cooperation were found in this study also to be an area where further research was required; this was noted particularly in regard to whether risk aversion was a reason for the lack of cooperation with other businesses shown by some of the wineries surveyed in 2010. Hall and Mitchell (2004) have cited the need for further research into how the policies and actions of governing bodies impact on wine clusters and networks within New Zealand, and the results of the 2010 survey further highlight that there are significant gaps in this area in terms of communication and political issues between wineries and industry organisations.

6.4 Conclusion

The New Zealand wine industry is still in a relatively formative phase compared to its well established European counterparts. As the industry matures, undoubtedly there will be challenges, and the true measure of the future success of the New Zealand wine industry will be how it copes with these challenges; the industry could either chose to maintain the status quo, or meet these challenging times through developing a direct dialogue with their customers in order to maximise the opportunities in terms of sales and brand promotion that wine tourism offers.

Though the nature of wine tourism in New Zealand appears to fluctuate, the generally positive attitude of the wine industry towards tourism does indicate that there is still unrealised potential within the industry, provided that it is both safeguarded against external threats, and is also promoted correctly through the appropriate channels in order to assure future growth. Increased knowledge sharing needs to occur so that the lessons learnt by overseas wine regions need not be repeated by the New Zealand wine industry as it has already experienced substantial economic turbulence. As Cooper (2002: 25) stated, the “old rollercoaster ride, soaring and plunging through periods of growth and optimism, decline and disillusionment” needs to change course; and it is clear through looking between the vines in this study that proper institutional support and promotion is needed to take New Zealand wine tourism to the next level if it is to move beyond the current group of established pioneers and small-scale hobbyists who permeate the industry.

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Appendices

Appendix A: 2010 New Zealand National Wineries' Survey

Appendix B: 2003 New Zealand National Wineries' Survey

*Note: No copies in any form of the 1997 Survey were still in existence, hence why it has not been included in these appendices.

Appendix C: Cover letter for the 2010 New Zealand National Wineries' Survey

Appendix D: Declaration for Masters Thesis

New Zealand Wine Tourism Survey 2010

WINERY PROFILE

PLEASE NOTE: All responses will be treated in the strictest confidence. Any results published will be in aggregate form only, thus ensuring the privacy and protection of all respondents, both individually and within a particular region.

1. Winery Location

In which winery region are you located? (Please select ONE)

- | | | |
|------------------------------------------|-----------------------------------------------|------------------------------------------------|
| <input type="radio"/> Northland/Matakana | <input type="radio"/> Gisborne | <input type="radio"/> Canterbury (non-Waipara) |
| <input type="radio"/> Waiheke Island | <input type="radio"/> Hawkes Bay | <input type="radio"/> Central Otago |
| <input type="radio"/> Auckland | <input type="radio"/> Wairarapa/Martinborough | <input type="radio"/> Great Barrier Island |
| <input type="radio"/> Waikato | <input type="radio"/> Marlborough | <input type="radio"/> Nelson |
| <input type="radio"/> Bay of Plenty | <input type="radio"/> Waipara | |

Other (please specify)

2. Winery Age

What year were grapes first planted in your vineyard?

What year was the first commercial release of your wine?

When was your winery first opened to visitors?

3. Employees

Please indicate the total number of full-time, part time and casual workers employed by your winery over the 2009 tax year (1 April 2009 - 31 March 2010). Please include yourself in these figures.

Full time

Part time

Casual

4. Annual wine production

Please indicate your total annual wine production in units of litres.

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5. Is your wine made on site? (Please select ONE)

Yes

No

If no, please state where your wine is made.

6. How would you describe the ownership status of your winery? (Please select ONE)

Sole proprietor

Partnership

Private company

Public company

Trust

Other

If other, please specify:

7. Turnover

Please indicate the TOTAL amount received from the sale of all products and services at your winery over the 2009 tax year (1 April 2009 - 31 March 2010). Please include sales of wine, food, accommodation and other products and services offered at your winery. Please note the answers will be kept strictly confidential and will be amalgamated and used for statistical purposes only. (Please select ONE)

Less than \$50,000

\$250,000 - \$499,999

Prefer not to state

\$50,000 - \$99,999

\$500,000 - \$750,000

\$100,000 - \$249,999

Over \$750,000

8. All Sales

What proportion of your winery's total income falls into the following categories? (Please estimate)

Cellar door wine sales (%)

Internet order wine sales (%)

Postal mail order wine sales (%)

Other domestic wine sales (%)

Export wine sales (%)

Accommodation (%)

Other products and services (%)

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9. Now thinking about the "Other domestic wine sales" only

What proportion of your domestic wine sales fall into the following categories? (Please estimate)

Specialist wine stores (%)	<input type="text"/>
Supermarkets (%)	<input type="text"/>
Wine clubs (%)	<input type="text"/>
Restaurants (%)	<input type="text"/>
Farmers markets (%)	<input type="text"/>
Other outlets (%)	<input type="text"/>

10a. Cellar door sales

Do you offer cellar door sales?

- Yes No (if no, please continue to Question 10c)

10b. If you do offer cellar door sales, then:

How important are they to your business?

Extremely	Very	Somewhat	Not very	Not at all	Don't know
<input type="radio"/>					

10c. If you don't currently offer cellar door sales, are you intending to offer them in the future?

- Yes No

11a. Tasting fees

Do you charge tasting fees?

- Yes No (if no, please continue to question 12a)

11b. If you do charge tasting fees, please state the proportion that is refunded in a dollar (\$) amount upon purchase.

12a. Local sales

Apart from cellar door sales, are your wines available locally?

- Yes No (if no, please continue to Question 13)

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12b. If your wines are available locally, then where can they be purchased from?

- | | | |
|-----------------------------------------------------|-------------------------------------------------|----------------------------------------|
| <input type="checkbox"/> Cafes or restaurants | <input type="checkbox"/> Supermarkets | <input type="checkbox"/> Accommodation |
| <input type="checkbox"/> Pubs, taverns or wine bars | <input type="checkbox"/> Specialist wine stores | |
| <input type="checkbox"/> Other (please specify) | | |
-

13. Products

What types of products do you offer visitors to your winery? (Please select ALL that apply)

- | | | |
|------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> Company branded merchandise | <input type="checkbox"/> Regional merchandise | <input type="checkbox"/> Regional promotional material |
| <input type="checkbox"/> Promotional material | <input type="checkbox"/> Company branded promotional material | |
| <input type="checkbox"/> Other wine merchandise (please specify) | | |
-

14. Services

What types of services do you offer visitors to your winery? (Please select ALL that apply)

- | | | |
|------------------------------------------------|-------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Winery tours | <input type="checkbox"/> Host functions | <input type="checkbox"/> Events / festivals |
| <input type="checkbox"/> Vineyard tours | <input type="checkbox"/> Host conferences | <input type="checkbox"/> Entertainment |
| <input type="checkbox"/> Wine tasting | <input type="checkbox"/> Restaurant | <input type="checkbox"/> Other services or food services |
| <input type="checkbox"/> Tasting or snack food | <input type="checkbox"/> Accommodation | |

15. Facilities

What facilities do you offer visitors to your winery? (Please select ALL that apply)

- | | | |
|------------------------------------------------------------|------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Wine cave | <input type="checkbox"/> Historical displays | <input type="checkbox"/> BBQ area |
| <input type="checkbox"/> Barrel hall | <input type="checkbox"/> Conference facilities | <input type="checkbox"/> Picnic or entertainment area |
| <input type="checkbox"/> Winemaking demonstrations | <input type="checkbox"/> Children's playground | |
| <input type="checkbox"/> Other facilities (please specify) | | |
-

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16a. Services for people who have disabilities

Do you offer wheelchair access to:

(Please select ALL that apply)

Tasting room

Vineyard

Toilets

Winery

Restaurant/wine bar

16b. Do you offer services for people who have visual or hearing impairments?

Yes

No

If you answered yes, please specify what services these are:

16c. Do you offer any other services for people who have disabilities? (please specify)

New Zealand Wine Tourism Survey 2010

VISITOR PROFILE

For questions 17 through to 19 of this section, please indicate the estimated proportion of your visitors who you think would fit into each of these categories. For these questions your best estimate is sufficient.

17. Age

What proportion of your visitors fall into the following age groups?

Under 18 years (%)	<input type="text"/>
18-29 years (%)	<input type="text"/>
30-39 years (%)	<input type="text"/>
40-49 years (%)	<input type="text"/>
50-59 years (%)	<input type="text"/>
60 + years (%)	<input type="text"/>

18. Gender

What proportion of your visitors are male and what proportion are female?

Male (%)	<input type="text"/>
Female (%)	<input type="text"/>

19. Visitor Origin

What proportion of your visitors are from New Zealand and what proportion are from overseas?

New Zealand Visitors? (%)	<input type="text"/>
Overseas Visitors? (%)	<input type="text"/>

20a. Wine Tourism Groups

Does your vineyard form part of any commercial wine tour?

- Yes No (if no, please go to Question 21)

20b. If your vineyard forms part of a commercial wine tour, what types of tours visit your vineyard? (Please select ALL that apply)

- Self-guided tours Local tour operator(s) Travel company(s)

New Zealand Wine Tourism Survey 2010

21. Visitor Information Collection

How do you collect information about the number of people visiting your winery?

(Please select as many as applicable)

No systematic way of collecting the information

Mailing list

Surveys

Till receipts

Counters

Other (please specify)

22. Number of visitors

Please estimate the number of visits to your winery for each month over the 2009 tax year (1 April 2009-31 March 2010).

If records are unavailable, please provide your best estimate.

April 2009	<input type="text"/>
May 2009	<input type="text"/>
June 2009	<input type="text"/>
July 2009	<input type="text"/>
August 2009	<input type="text"/>
September 2009	<input type="text"/>
October 2009	<input type="text"/>
November 2009	<input type="text"/>
December 2009	<input type="text"/>
January 2010	<input type="text"/>
February 2010	<input type="text"/>
March 2010	<input type="text"/>

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23. Reasons for visit

What do you consider to be the main reason visitors come to your winery? (Please select as many as applicable)

- | | | |
|-------------------------------------------------|-------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Buying wines | <input type="checkbox"/> Meeting the wine maker | <input type="checkbox"/> A day out |
| <input type="checkbox"/> Tasting wines | <input type="checkbox"/> Organic wines | <input type="checkbox"/> Relaxation |
| <input type="checkbox"/> Learning about wines | <input type="checkbox"/> Socialising | <input type="checkbox"/> Festivals or events |
| <input type="checkbox"/> Winery tour | <input type="checkbox"/> Picnic or BBQ | |
| <input type="checkbox"/> Other (please specify) | | |

24. Visitor attributes

How would you describe the majority of visitors to your winery?
(Please give a percentage estimate in the box provided. The sum total of ALL percentages must add up to 100%)

Wine lovers... with advanced knowledge of wine

Wine interested... with intermediate knowledge of wine

Wine curious... with basic or no knowledge of wine

25. Visitor Information

Do you believe that information on visitor numbers and characteristics would be, or is useful to your business operation?

(Please select ONE of option)

I believe that information on visitor numbers and characteristics would be useful /or is useful to my business operation

Strongly Agree

Agree

Unsure

Disagree

Strongly disagree

New Zealand Wine Tourism Survey 2010

SUSTAINABILITY AND YOUR WINERY

26b. Do you believe that sustainability practices employed by your winery provide an important source of competitive advantage?

(please select ONE of the following options)

I believe that sustainability practices employed by my winery provide an important source of competitive advantage

Strongly Agree Agree Unsure Disagree Strongly Disagree

26a. How important do you believe that sustainability practices are for the New Zealand wine industry? (please select ONE of the following options)

I believe that sustainability practices are important for the New Zealand wine industry

Strongly Agree Agree Unsure Disagree Strongly disagree

26c. During the last two financial years, what were the reasons that your winery chose to employ sustainability practices? (Please select as many options as applicable)

- to increase revenue
- to reduce energy consumption
- to improve productivity
- to reduce costs
- to reduce environmental impact
- to attract visitors to my winery
- to increase market share
- to establish/exploit new market opportunities

Other (please specify)

26d. Is your winery an accredited member of Sustainable Wineries New Zealand (SWNZ)?

Yes No

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BIOSECURITY AND YOUR WINERY

27a. Does your vineyard have biosecurity measures in place with respect to wine tourists?

Yes

No

If you answered yes to this question, please specify the measures you have in place:

27b. Are visitors allowed to wander freely amongst the vines at your winery?

Yes

No

27c. Do you believe that your winery currently receives adequate information regarding biosecurity threats from Government agencies? (please select ONE of the following options)

I believe that my winery currently receives adequate information regarding biosecurity threats from Government agencies

Strongly Agree Agree Unsure Disagree Strongly disagree

27d. Do you believe that your winery currently has an effective strategy in place to deal with any potential biosecurity threats?

(please select ONE of the following options)

I believe that my winery currently has an effective strategy in place to deal with any potential biosecurity threats

Strongly agree Agree Unsure Disagree Strongly disagree

27e. How do you currently receive information regarding potential biosecurity threats to your winery?

(Please select as many as applicable)

Ministry of Agriculture and Forestry (MAF)

Universities or polytechnics

Newspapers

New Zealand Winegrowers

Other competing businesses within the wine industry

Word of mouth

Local or regional councils

Websites

Crown Research Institutes

Television

Other (please specify)

New Zealand Wine Tourism Survey 2010

27f. Do you think that biosecurity should be part of the Sustainable Wineries New Zealand (SWNZ) scheme?

Yes

No

New Zealand Wine Tourism Survey 2010

INNOVATION AND YOUR WINERY

For the purpose of this survey innovation is broadly defined. It includes the development or introduction of any new or significantly improved activity for your winery. This includes products, processes and methods that this winery was first to develop and those that have been adopted from other organisations.

28a. During the last two financial years, did your winery introduce on to the market any new or significantly improved goods or services?

(Don't include the selling of new goods or services wholly produced and developed by other businesses)

Yes (go to Question 27b)

No (go to Question 29a)

28b. Were any of these new or significantly improved goods or services:

(Please select ALL that apply)

Developed by this business

Obtained from others and significant improvements were made by this business

Developed by this business in partnership with others

Obtained from others and NO significant improvements were made by this business

28c. For the last financial year, please select the ONE option that best estimates the percentage of sales for this winery that came from those new or significantly improved goods or services.

Zero

30% or less

Don't know

10% or less

40% or less

20% or less

41% - 100%

29a. During the last two financial years, did your winery introduce on to the market any new or significantly improved operational processes (i.e methods of producing or distributing goods or services)

Yes (go to Question 29b)

No (go to Question 30a)

29b. Were any of those new or significantly improved operational processes:

(Please select ALL that apply)

Developed by this business

Obtained from others and significant improvements were made by this business

Developed by this business in partnership with others

Obtained from others and NO significant improvements were made by this business

New Zealand Wine Tourism Survey 2010

30a. During the last two financial years, did your winery implement any new or significantly improved organisational/managerial processes (i.e significant changes in your winery's strategies, structures or routines)?

Yes (go to Question 30b)

No (go to Question 31a)

30b. Were any of those new or significantly improved organisational/managerial processes:

(Please select ALL that apply)

Developed by this business

Obtained from others and significant improvements were made by this business

Developed by this business in partnership with others

Obtained from others and NO significant improvements were made by this business

31a. During the last two financial years, did your winery implement any new or significantly improved sales or marketing methods which were intended to either increase the appeal of goods or services for specific market segments or to gain entry to new markets?

Yes (Go to Question 31b)

No (Go to Question 32)

31b. Were any of those new or significantly improved sales or marketing methods:

(Please select ALL that apply)

Developed by this business

Obtained from others and significant improvements were made by this business

Developed by this business in partnership with others

Obtained from others and NO significant improvements were made by this business

New Zealand Wine Tourism Survey 2010

32. Reasons for innovation

During the last two financial years, what were the reasons that your winery tried to innovate?

	Yes	No	Don't Know
To improve productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To increase productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To reduce costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To increase responsiveness to customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To increase market share	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To establish/exploit new market opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To improve work safety standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To reduce energy consumption	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To reduce environmental impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To replace goods and services being phased out	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

33. Sources of ideas or information for innovation

During the last two financial years, did this winery find any of the following important as a source of ideas or information for innovation?

	Yes	No	Don't Know
New staff (those appointed in the last 2 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Existing staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other businesses within the business group (e.g. subsidiaries or parent companies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitors and other businesses from the same industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Businesses from other industries (not including customers or suppliers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional advisors, consultants, banks or accountants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Books, journals, patent disclosures or the internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine shows, festivals or conferences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Industry or employer organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Universities or polytechnics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crown Research Institutes, other research institutes, or research associations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

New Zealand Wine Tourism Survey 2010

34. Activities to support innovation

During the last two financial years, did your winery do any of the following:

	Done to support innovation	Done, though NOT to support innovation	Not Done	Don't know
Introduce a new variety of grape	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use new viticultural techniques	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acquire new machinery and equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acquire new computer hardware and software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acquire other knowledge (e.g. outsourcing for new viticultural techniques or other intellectual property)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implement new business strategies or management techniques	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implement organisational restructuring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Design (e.g. graphic design on labelling of bottles)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Market the introduction of new goods and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Market research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Make significant changes to existing marketing strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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CO-OPERATIVE ARRANGEMENTS

In the following questions co-operative arrangements mean actively participating with another organisation or individual, in activities for the purpose of innovation.

35. During the last two financial years, did this business have any co-operative arrangements for the purpose of innovation?

Yes (go to Question 36)

No (go to Question 39)

36. During the last two financial years, with what types of business or institutions did this business have those co-operative arrangements? (Please select ALL the options that apply)

	NZ	Overseas	No co-operation
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Businesses from other industries (not including customers or suppliers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitors and other businesses from the same industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other businesses within the business group (e.g. subsidiaries or parent companies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Universities or polytechnics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crown Research institutes, other research institutes, or research associations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

37. During the last two financial years, in which activities did this business engage in co-operative arrangements, as defined at the start of this section?

Joint marketing or distribution

Joint R & D

Joint training

Joint production

Joint prototype development

Other

38. During the last two financial years, for what reasons did this business engage in co-operative arrangements, as defined at the start of this section?

Sharing costs

Access to work practices

Spreading risk

Access to financial resources

Access to R & D

Access to new markets

Access to production processes

Access to new suppliers

Access to management skills

Other

Access to new distribution channels

New Zealand Wine Tourism Survey 2010

TOURISM AND MARKETING

39. WINE AND FOOD FESTIVALS

What, if any, wine and food festivals on this comprehensive list did you participate in over the 2009 tax year

(1 April 2009—31 March 2010)?

Please select as many as is appropriate.

- | | | |
|-----------------------------------------------------------------------------|------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> None | <input type="checkbox"/> Kaikoura Seafest | <input type="checkbox"/> Taste Gisborne Festival |
| <input type="checkbox"/> Akaroa French Festival | <input type="checkbox"/> McCullochs Gisborne Wine and Food Festival | <input type="checkbox"/> Taste Northland |
| <input type="checkbox"/> Bay of Islands Jazz and Blues Festival | <input type="checkbox"/> Manawatu Wine and Food Festival | <input type="checkbox"/> Taste Otago |
| <input type="checkbox"/> Bluff Oyster and Southland Seafood Festival | <input type="checkbox"/> Marlborough Culinary Fare | <input type="checkbox"/> Taste the Regions Wines (Napier) |
| <input type="checkbox"/> BMW Marlborough Wine Festival | <input type="checkbox"/> Marlborough Winter Wine Weekend | <input type="checkbox"/> Tauranga Boutique Food and Wine Festival |
| <input type="checkbox"/> Canterbury Wine and Food Festival | <input type="checkbox"/> Martinborough Around the Vines | <input type="checkbox"/> The Village Festival (Havelock North) |
| <input type="checkbox"/> Capital Wine and Food Festival | <input type="checkbox"/> Midlands Hawkes Bay Charity Wine Auction | <input type="checkbox"/> Toast Martinborough |
| <input type="checkbox"/> Central Otago Wine and Food Festival | <input type="checkbox"/> Nelson Aromatics Symposium | <input type="checkbox"/> Vintage Alfresco |
| <input type="checkbox"/> Christmas Country Fete (Culverden, Nth Canterbury) | <input type="checkbox"/> New Zealand Syrah Symposium (Hawkes Bay) | <input type="checkbox"/> Waiheke Wine Festival |
| <input type="checkbox"/> Diners Club Devonport Food and Wine Festival | <input type="checkbox"/> New Zealand Cabernet Merlot Symposium (Hawkes Bay) | <input type="checkbox"/> Waipara Wine and Food Celebration |
| <input type="checkbox"/> Gisborne Wine and Food Festival NEW | <input type="checkbox"/> New Zealand Organic Wine and Food Festival (Oamaru) | <input type="checkbox"/> Wairarapa Wine and Food Festival |
| <input type="checkbox"/> "Good Oil" Weekend (Hawkes Bay) | <input type="checkbox"/> New Zealand Wine and Food Festival (London) | <input type="checkbox"/> Waitakere Spring Wine Festival |
| <input type="checkbox"/> Harvest Hawkes Bay Wine and Food Extravaganza | <input type="checkbox"/> Organic River Festival (Levin) | <input type="checkbox"/> WETA Wine and Food Festival |
| <input type="checkbox"/> Hokitika Wildfoods Festival | <input type="checkbox"/> Pinot at Cloudy Bay | <input type="checkbox"/> Wine Marlborough Festival |
| <input type="checkbox"/> Kumeu Food and Wine Festival | <input type="checkbox"/> Savour New Zealand (Christchurch) | |
| <input type="checkbox"/> Hooked on Seafood (Nelson) | <input type="checkbox"/> Taranaki Wine and Food Festival | |
| <input type="checkbox"/> Other (Please specify FESTIVALS and DATES) | | |

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40. WINERY ATTRIBUTES

How important are the following attributes of YOUR WINERY in attracting visitors?

(Please select ONE option)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know
Winery	<input type="radio"/>					
Tasting area	<input type="radio"/>					
Atmosphere and setting	<input type="radio"/>					
Quality of wines	<input type="radio"/>					
Wine awards received	<input type="radio"/>					
Knowledge of your wines	<input type="radio"/>					
Personalised and friendly service	<input type="radio"/>					
Meeting the winemaker	<input type="radio"/>					
Food	<input type="radio"/>					
Location	<input type="radio"/>					
Quality of the environment	<input type="radio"/>					
Whole experience	<input type="radio"/>					
Other	<input type="radio"/>					

If you selected other, please specify what these attribute(s) are:

41. REGIONAL ATTRIBUTES

How important are the following attributes of YOUR WINE REGION in attracting visitors to your winery?

(Please select ONE option)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know
Prestige or character of district	<input type="radio"/>					
Quality of wines	<input type="radio"/>					
Quality of the environment	<input type="radio"/>					
Other attractions and activities	<input type="radio"/>					
Festivals and events	<input type="radio"/>					
Scenery	<input type="radio"/>					
Size	<input type="radio"/>					
Proximity to major city or tourist destination	<input type="radio"/>					
Other (please specify)	<input type="radio"/>					

If you selected OTHER, please specify what these attribute(s) are:

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42a. INFORMATION SOURCES

Please indicate whether or not you use the following media for attracting visitors to YOUR WINERY.

	Yes	No
Wine shows	<input type="radio"/>	<input type="radio"/>
Wine and food festivals	<input type="radio"/>	<input type="radio"/>
Wine club	<input type="radio"/>	<input type="radio"/>
Retail trade	<input type="radio"/>	<input type="radio"/>
Tourism New Zealand	<input type="radio"/>	<input type="radio"/>
Local or regional tourism organisation	<input type="radio"/>	<input type="radio"/>
Visitor information sources	<input type="radio"/>	<input type="radio"/>
Word of mouth	<input type="radio"/>	<input type="radio"/>
New Zealand Winegrowers	<input type="radio"/>	<input type="radio"/>
Mailing list	<input type="radio"/>	<input type="radio"/>
Magazines	<input type="radio"/>	<input type="radio"/>
Newspapers	<input type="radio"/>	<input type="radio"/>
Radio	<input type="radio"/>	<input type="radio"/>
Television	<input type="radio"/>	<input type="radio"/>
Website	<input type="radio"/>	<input type="radio"/>
Guidebooks	<input type="radio"/>	<input type="radio"/>
Internet promotion	<input type="radio"/>	<input type="radio"/>
Online Social Networking Media	<input type="radio"/>	<input type="radio"/>
Brochures	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

If you selected other, please specify:

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42b. How important are these media for attracting visitors to YOUR WINERY? (please select ONE option)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know
Wine shows	<input type="radio"/>					
Wine and food festivals	<input type="radio"/>					
Wine club	<input type="radio"/>					
Retail trade	<input type="radio"/>					
Tourism New Zealand	<input type="radio"/>					
Local or regional tourism organisation	<input type="radio"/>					
Visitor information sources	<input type="radio"/>					
Word of mouth	<input type="radio"/>					
New Zealand Winegrowers	<input type="radio"/>					
Mailing list	<input type="radio"/>					
Magazines	<input type="radio"/>					
Newspapers	<input type="radio"/>					
Radio	<input type="radio"/>					
Television	<input type="radio"/>					
Website	<input type="radio"/>					
Guidebooks	<input type="radio"/>					
Internet promotion	<input type="radio"/>					
Online Social Networking Media	<input type="radio"/>					
Brochures	<input type="radio"/>					
Other	<input type="radio"/>					

43. TOURISM AND YOUR WINERY

What is your attitude towards tourism activity at YOUR WINERY? (Please select ONE option)

	Strongly agree	Agree	Unsure	Disagree	Strongly Disagree
Cellar door visitors do not buy much wine	<input type="radio"/>				
Tourists are valuable	<input type="radio"/>				
Tourism attracts a wide range of customers to my winery	<input type="radio"/>				
Tourism provides significant marketing opportunities	<input type="radio"/>				
Tourism positively impacts the sales of my wine offshore	<input type="radio"/>				
Tourism does not contribute greatly to my business success	<input type="radio"/>				
The overall benefits of tourism outweigh the negative impacts	<input type="radio"/>				
Tourism increases awareness of my winery through word of mouth	<input type="radio"/>				
Tourism does not attract the kind of visitors I want to my winery	<input type="radio"/>				

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44. TOURISM AND YOUR REGION

What is your attitude towards tourism and tourism development in YOUR REGION?

(Please select ONE option)

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
The tourism industry is important to the wine industry as a whole	<input type="radio"/>				
Promoting tourism in the region brings more visitors to my winery	<input type="radio"/>				
I believe that tourism in the region should be actively encouraged in the wine industry	<input type="radio"/>				
The wine industry has much to offer the tourism industry	<input type="radio"/>				
The tourism industry has much to offer the wine industry	<input type="radio"/>				

45. TOURISM AND YOUR WINE

What is your attitude towards tourism and wine sales?

(Please select ONE option)

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
Tourism enhances product/brand awareness	<input type="radio"/>				
Tourism helps to differentiate my wine from others	<input type="radio"/>				
Tourism helps to develop postal mail order sales	<input type="radio"/>				
Tourism helps to develop internet based sales	<input type="radio"/>				
Tourism helps to educate my customers	<input type="radio"/>				

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46. TOURISM PROMOTION

The following is a list of tourist promotions in your region. Which of these have been successful in attracting visitors to YOUR WINERY?

(Please select ONE option)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know
Regional wineries' brochure	<input type="radio"/>					
Holiday and travel shows	<input type="radio"/>					
Wine and food festivals	<input type="radio"/>					
Tourism awards Media familiarisation	<input type="radio"/>					
Public tastings	<input type="radio"/>					
Wine exhibitions/shows	<input type="radio"/>					
Regional tourist guides	<input type="radio"/>					
Winery based events	<input type="radio"/>					
Wine trail or road signage	<input type="radio"/>					
Regional website	<input type="radio"/>					
Other (please specify)	<input type="radio"/>					

If you selected other, then please specify what promotions these are:

47. Who do you feel should be primarily responsible for PROMOTING wine tourism?

(Please rank in order of importance, 1= MOST IMPORTANT)

Regional tourism organisation	<input type="text"/>
Wine industry associations	<input type="text"/>
Individual wineries	<input type="text"/>

If you think that there are any other organisation(s) that should be primarily responsible for promoting wine tourism, please state this in the box provided:

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48. Alliances

What type of relationship, if any, DO YOU HAVE with the following organisations?
 (Please select corresponding option for each question or state other relationship)

	None	Contact as Required	Member	Co-operative marketing or promotion	Other relationship
a) Tourism New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) Regional Tourism Organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) New Zealand Winegrowers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) Sustainable Winegrowers New Zealand (SWNZ)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) NZGVIG	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) Regional Grape Growers Organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f) NZ Society of Viticulture and Oenology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g) Regional Wine Organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h) Visitor Information Centres	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i) Tourism Industry Association of NZ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j) 100% Pure New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k) Business Development Boards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l) Local Council	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m) Regional Council	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
n) Trade and Industry New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o) Chamber of Commerce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
p) Ministry of Economic Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
q) Other Central Government Agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
r) Hospitality associations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
s) Local food and wine promotion group/network	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you are a member of any other industry organisation(s) that are not listed above, then please specify who these organisation(s) are in the box provided:

New Zealand Wine Tourism Survey 2010

49. OTHER PROMOTIONS

What other promotional activities would you like to see conducted to promote tourism to the wineries in your region?

50. Do you have any comments on wine tourism that have not been covered by this survey, or that you feel are particularly important for your winery, your wine region, or wine tourism in New Zealand?

Your completion of this questionnaire is greatly appreciated. Your response will assist in helping us understand winery characteristics and the emphasis New Zealand wineries place on wine tourism.

New Zealand Wine Tourism Survey 2010

PERSONAL DETAILS

PLEASE NOTE: All responses will be treated in the strictest confidence. Any results published will be in aggregate form only, thus ensuring the privacy and protection of all respondents, both individually and within a particular region.

Do you wish to receive a copy of the survey results?

Yes

No

If yes, how do you wish to receive them?

Post

Email

Further surveys

Would you be willing to participate in further surveys?

Yes

No

Would you like to go into the draw to win a copy of the book 'Wine Marketing: a practical guide' by C. Michael Hall and Richard Mitchell?

Yes

No

Would you also like the previous survey summary results from 1997 and 2003 to be sent to you?

Yes

No

If yes, how do you wish to receive them?

Post

Email

Your Name

Your organisation

Your title or position

Your address

Once again, thank you for completing this questionnaire. It is hoped that at some time in the future this research will benefit both yourselves and the wine industry as a whole.

Appendix B: New Zealand Wine Tourism Survey 2003

WINERY PROFILE

1. Winery Location

In which winery region are you located? *(Please tick ONE)*

<input type="checkbox"/> Auckland	<input type="checkbox"/> Bay of Plenty	<input type="checkbox"/> Canterbury	<input type="checkbox"/> Central Otago
<input type="checkbox"/> Gisborne	<input type="checkbox"/> Hawke's Bay	<input type="checkbox"/> Marlborough	<input type="checkbox"/> Nelson
<input type="checkbox"/> Northland	<input type="checkbox"/> Waiheke Island	<input type="checkbox"/> Waikato	<input type="checkbox"/> Waipara
<input type="checkbox"/> Wairarapa	<input type="checkbox"/> Other <i>(please specify)</i> _____		

2. Winery Age

When were grapes first planted in your vineyard?	Year _____
When was the first commercial release of your wine?	Year _____
When was your winery first opened to visitors?	Year _____

3. Employees

Please indicate the total number of full-time, part time and casual workers employed by your winery over the 2003 tax year (1 April 2002-31 March 2003). Please include yourself in these figures.

Fulltime _____ Part-time _____ Casual _____

4. Production

Please indicate your total wine production in units of litres. _____ litres.

4.a. Is your wine made on site? *(Please tick)*

Yes
 No If no, please state where you have your wine made.

5. How would you describe the ownership status of your winery? *(Please tick ONE)*

Sole proprietor Public company Partnership Trust Private company other _____

6. Turnover

Please indicate the TOTAL amount received from the sale of all products and services at your winery over the 2003 tax year (1 April 2002-31 March 2003). Please include sales of wine, food, accommodation and other products and services offered at your winery. Please note the answers will be kept *strictly confidential* and will be amalgamated and used for statistical purposes only. *(Please tick ONE)*

<input type="checkbox"/> Less than \$50 000	<input type="checkbox"/> \$50 - \$99 999	<input type="checkbox"/> \$100 - \$249 999	<input type="checkbox"/> \$250 - \$499 999
<input type="checkbox"/> \$500 - \$750 000	<input type="checkbox"/> Over \$750 000	<input type="checkbox"/> prefer not to state	

7. All Sales

What proportion of your winery's total income falls into the following categories? *(Please estimate)*

Cellar door wine sales _____%	Mail order wine sales _____%	Other domestic wine sales _____%
Export wine sales _____%	Accommodation _____%	Other products and services _____%

8. Now thinking about the "Other domestic wine sales" only

What proportion of your domestic wine sales fall into the following categories? *(Please estimate)*

Specialist wine stores _____%	Supermarkets _____%	Wine clubs _____%
Restaurants _____%	Farmers markets _____%	
Other outlets <i>(please specify)</i> _____%		

9. **Cellar door sales**

Do you offer cellar door sales?

Extre- mely	Very	Some what	Not very	Not at all	Don't know
1	2	3	4	5	DK

Yes \Leftarrow If yes, how important are they to your business?

No \Leftarrow If no, are you intending to offer cellar door sales in the future?

Yes No

10. **Opening hours**

When is your winery open to visitors? (Please indicate opening hours) **Eg. Jan 9am-6pm, July closed**

Jan _____	Feb _____	March _____	April _____	May _____	June _____
July _____	Aug _____	Sept _____	Oct _____	Nov _____	Dec _____

11. **Tasting fees**

Do you charge tasting fees? Yes, (please answer question 11.a) No, (if no, continue to question 12)

11.a. If yes, do you refund on purchase? No

Yes, the full amount

Yes, a partial amount (please specify) _____

12. **Local sales**

Apart from cellar door sales, are your wines available locally? Yes No

If yes, where? Cafés or restaurants Pubs, taverns or wine bars

Supermarkets Specialist wine stores

Accommodation Other (please specify) _____

13. **Products, services and facilities**

What types of products and services do you offer visitors to your winery? (Please tick ALL that apply)

A. Products

Company branded merchandise Promotional material Regional merchandise

Company branded promotional material Regional promotional material

Other wine merchandise (please specify) _____

B. Services and Food

Winery tours Vineyard tours Wine tasting Tasting or snack food

Host functions Host conferences Restaurant Accommodation

Events / festivals Entertainment Other services or food services

C. Facilities

Wine cave Barrel hall Winemaking demonstrations

Historical displays Conference facilities Children's playground

BBQ area Picnic or entertainment area Other facilities (please specify) _____

D. Services for people who have disabilities

Wheelchair access to Tasting room Winery Vineyard

Restaurant/wine bar Toilets
 Services for people who have visual or hearing impairments Yes, (please specify) _____
 _____ No
 Other services for people who have disabilities (please specify) _____

VISITOR PROFILE

For questions 14 through 16 please indicate the estimated proportion of your visitors who you think would fit into each of these categories. For these questions your best estimate is sufficient.

14. Age

What proportion of your visitors fall into the following age groups?

Under 18 years _____ % 18-29 years _____ % 30-39 years _____ % 40-49 years _____ %
 50-59 years _____ % 60 + years _____ %

15. Gender

What proportion of your visitors are male and what proportion are female?

Male _____% Female _____%

The following table is a more comprehensive version of the questions you have answered above. If you are able, please complete this also. An example is given on the top line of the table.

Visitors	% of total visitors	% male visitors	% female visitors
<i>Example (18-29yrs)</i>	<i>25% (of all visitors fall into this age category)</i>	<i>40% (of those 18-29 years of age, 40% are male)</i>	<i>60% (of those 18-29 years of age, 60% are female)</i>
Under 18 years			
18-29 years			
30-39 years			
40-49 years			
50-59 years			
60 years plus			

16. Visitor Origin

What proportion of your visitors are from New Zealand and what proportion are from overseas?

New Zealand Visitors? _____% Overseas Visitors? _____%

17. Wine Tourism Groups

Does your vineyard form part of any commercial wine tour? Yes No

If yes, what types of tours visit your vineyard? (Please tick)

Self-guided tours Local tour operator(s) Travel company(s)

18. Biosecurity

Does your vineyard have biosecurity measures in place with respect to wine tourists?

Yes (Please specify _____) No

19. Visitor Information Collection

How do you collect information about the number of people visiting your winery? (Please tick as many as applicable)

- No systematic way of collecting the information
- Mailing list _____
- Surveys _____
- Till receipts
- Counters (please specify)
- Other (please specify)

20. Number of visitors

Please estimate the number of visits to your winery for each month over the 2003 tax year (1 April 2002-31 March 2003). If records are unavailable, please provide your best estimate.

April 2002	_____	May 2002	_____	June 2002	_____
July 2002	_____	Aug 2002	_____	Sept 2002	_____
Oct 2002	_____	Nov 2002	_____	Dec 2002	_____
Jan 2003	_____	Feb 2003	_____	Mar 2003	_____

21. Reasons for visit

What do you consider to be the main reason visitors come to your winery? (Please tick as many as applicable)

- Buying wines
- Meeting the wine maker
- Picnic or BBQ
- A day out
- Relaxation
- Other (please specify) _____
- Tasting wines
- Organic wines
- Festivals or events
- Learning about wines
- Socialising
- Winery tour

22. Visitor attributes

How would you describe the majority of visitors to your winery? (Please tick)

- Wine lovers...** with advanced knowledge of wine
- Wine interested...** with intermediate knowledge of wine
- Wine curious...** with basic or no knowledge of wine

23. Visitor Information

Do you believe that information on visitor numbers and characteristics would be, or is useful to your business opera

Strongly Agree	Agree	Unsure	Disagree	Strongly disagree
1	2	3	4	5

TOURISM AND MARKETING

24. Wine and Food Festivals

What, if any, wine and food festivals did you participate in over the 2003 tax year (1 April 2002—31 March 2003) *Please tick as many as is appropriate*

- | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><input type="checkbox"/> None</p> <p><input type="checkbox"/> Akaroa French Festival</p> <p><input type="checkbox"/> Bay of Islands Jazz and Blues Festival</p> <p><input type="checkbox"/> Bluff Oyster and Southland Seafood Festival</p> <p><input type="checkbox"/> BMW Marlborough Wine Festival</p> <p><input type="checkbox"/> Canterbury Wine and Food Festival</p> <p><input type="checkbox"/> Capital Wine and Food Festival</p> <p><input type="checkbox"/> Central Otago Wine and Food Festival</p> <p><input type="checkbox"/> Christmas Country Fete (Culverden, Nth Canterbury)</p> <p><input type="checkbox"/> Diners Club Devonport Food and Wine Festival</p> <p><input type="checkbox"/> "Good Oil" Weekend (Hawkes Bay)</p> <p><input type="checkbox"/> Harvest Hawkes Bay Wine and Food Extravaganza</p> <p><input type="checkbox"/> Hokitika Wildfoods Festival</p> <p><input type="checkbox"/> Kumeu Food and Wine Festival</p> <p><input type="checkbox"/> Hooked on Seafood (Nelson)</p> <p><input type="checkbox"/> Kaikoura Seafest</p> <p><input type="checkbox"/> McCullochs Gisborne Wine and Food Festival</p> <p><input type="checkbox"/> Manawatu Wine and Food Festival</p> <p><input type="checkbox"/> Marlborough Culinary Fare</p> <p><input type="checkbox"/> Marlborough Winter Wine Weekend</p> | <p><input type="checkbox"/> Martinborough Around the Vines</p> <p><input type="checkbox"/> New Zealand Organic Wine and Food Festival(Oamaru)</p> <p><input type="checkbox"/> New Zealand Wine and Food Festival (London)</p> <p><input type="checkbox"/> Organic River Festival (Levin)</p> <p><input type="checkbox"/> Pinot at Cloudy Bay</p> <p><input type="checkbox"/> Savour New Zealand (Christchurch)</p> <p><input type="checkbox"/> Taranaki Wine and Food Festival</p> <p><input type="checkbox"/> Taste Gisborne Festival</p> <p><input type="checkbox"/> Taste Northland</p> <p><input type="checkbox"/> Taste Otago</p> <p><input type="checkbox"/> Taste the Regions Wines (Napier)</p> <p><input type="checkbox"/> Tauranga Boutique Food and Wine Festival</p> <p><input type="checkbox"/> The Village Festival (Havelock North)</p> <p><input type="checkbox"/> Toast Martinborough</p> <p><input type="checkbox"/> Vintage Alfresco</p> <p><input type="checkbox"/> Waiheke Wine Festival</p> <p><input type="checkbox"/> Waipara Wine and Food Celebration</p> <p><input type="checkbox"/> Wairarapa Wine and Food Festival</p> <p><input type="checkbox"/> Waitakere Spring Wine Festival</p> <p><input type="checkbox"/> WETA Wine and Food Festival</p> <p><input type="checkbox"/> Other (<i>Please specify FESTIVALS and DATES</i>)</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

25. WINERY ATTRIBUTES

How important are the following attributes of **YOUR WINERY** in attracting visitors? (*Please circle ONE*)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know	
Winery	1	2	3	4	5	DK	
Tasting area	1	2	3	4	5	DK	
Atmosphere and setting			1	2	3	4	5 DK
Quality of wines			1	2	3	4	5 DK
Wine awards received			1	2	3	4	5 DK
Knowledge of your wines				1	2	3	4 5
DK							
Personalised and friendly service			1	2	3	4	5 DK
Meeting the winemaker			1	2	3	4	5 DK

Food	1	2	3	4	5	DK		
Location	1	2	3	4	5	DK		
Whole experience			1	2	3	4	5	DK
Other (please specify) _____			1	2	3	4	5	

26. **REGIONAL ATTRIBUTES**

How important are the following attributes of **YOUR WINE REGION** in attracting visitors to your winery?
(Please circle ONE)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know		
Prestige or character of district			1	2	3	4	5	DK
Quality of wines			1	2	3	4	5	DK
Other attractions and activities				1	2	3	4	5
DK								
Festivals and events			1	2	3	4	5	DK
Scenery	1	2	3	4	5	DK		
Size	1	2	3	4	5	DK		
Proximity to major city or tourist destination			1	2	3	4	5	DK
(Please specify PLACE) _____								
Other (please specify) _____			1	2	3	4	5	DK

27. **INFORMATION SOURCES**

How important are the following information media for attracting visitors to **YOUR WINERY**?

Please indicate whether or not you use the media, and if used, how useful you feel it is.

(Please circle)

	Use	Extremely	Very	Somewhat	Not	Not	Don't		
	ρ Yes	ρ No	very	at all	know				
Wine shows	ρ Yes	ρ No	1	2	3	4	5	DK	
Wine and food festivals	ρ Yes	ρ No	1	2	3	4	5	DK	
Wine club	ρ Yes	ρ No	1	2	3	4	5	DK	
Retail trade	ρ Yes	ρ No	1	2	3	4	5	DK	
Tourism New Zealand	ρ Yes	ρ No	1	2	3	4	5	DK	
Local or regional tourism organisation	ρ Yes	ρ No	1	2	3	4	5	DK	
Visitor information sources		ρ Yes	ρ No	1	2	3	4	5	
DK									
Word of mouth	ρ Yes	ρ No	1	2	3	4	5	DK	
New Zealand Winegrowers		ρ Yes	ρ No	1	2	3	4	5	
DK									
Mailing list	ρ Yes	ρ No	1	2	3	4	5	DK	
Magazines		ρ Yes	ρ No	1	2	3	4	5	DK
Newspapers	ρ Yes	ρ No	1	2	3	4	5	DK	
Radio	ρ Yes	ρ No	1	2	3	4	5	DK	
Television	ρ Yes	ρ No	1	2	3	4	5	DK	
Website	ρ Yes	ρ No	1	2	3	4	5	DK	
Guidebooks	ρ Yes	ρ No	1	2	3	4	5	DK	
Internet promotion		ρ Yes	ρ No	1	2	3	4	5	DK
Brochures	ρ Yes	ρ No	1	2	3	4	5	DK	
Other (please specify) _____				1	2	3	4	5	DK

28. **TOURISM AND YOUR WINERY**

What is your attitude towards tourism activity at **YOUR WINERY**?

(Please circle)

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree		
Cellar door visitors do not buy much wine			1	2	3	4	5
Tourists are valuable			1	2	3	4	5
Tourism attracts a wide range of customers to my winery			1	2	3	4	5
Tourism provides significant marketing opportunities			1	2	3	4	5

Tourism positively impacts the sales of my wine offshore	1	2	3	4	5	
Time spent with visitors to my winery is valuable		1	2	3	4	5
Tourism does not contribute greatly to my business success		1	2	3	4	5
The overall benefits of tourism outweigh the negative impacts		1	2	3	4	5
Tourism does not attract the kind of visitors I want to my winery		1	2	3	4	5

29. TOURISM AND YOUR REGION

What is your attitude towards tourism and tourism development in **YOUR REGION**?

(Please circle)

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
The tourism industry is important to the wine industry as a whole	1	2	3	4	5
Promoting tourism in the region brings more visitors to my winery	1	2	3	4	5
I believe that tourism in the region should be actively encouraged in the wine industry	1	2	3	4	5
The wine industry has much to offer the tourism industry	1	2	3	4	5
The tourism industry has much to offer the wine industry	1	2	3	4	5

30. TOURISM AND YOUR WINE

What is your attitude towards tourism and wine sales?

(Please circle)

	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
Tourism enhances product/brand awareness	1	2	3	4	5
Tourism helps to differentiate my wine from others	1	2	3	4	5
Tourism helps to develop mail order sales	1	2	3	4	5
Tourism helps to educate my customers	1	2	3	4	5

31. TOURISM PROMOTION

The following is a list of tourist promotions in your region. Which of these have been successful in attracting visitors to **YOUR WINERY**? (Please circle ONE)

	Extremely	Very	Somewhat	Not very	Not at all	Don't know	DK
Regional wineries' brochure		1	2	3	4	5	DK
Holiday and travel shows		1	2	3	4	5	DK
Wine and food festivals		1	2	3	4	5	DK
Tourism awards		1	2	3	4	5	DK
Media familiarisation		1	2	3	4	5	DK
Public tastings		1	2	3	4	5	DK
Wine exhibitions/shows		1	2	3	4	5	DK
Regional tourist guides		1	2	3	4	5	DK
Winery based events		1	2	3	4	5	DK
Wine trail or road signage		1	2	3	4	5	DK
Regional website		1	2	3	4	5	DK
Other (please specify)		1	2	3	4	5	DK

31.a. Who do you feel should be primarily responsible for **PROMOTING** wine tourism?

(Please rank in order of importance, 1= MOST IMPORTANT)

Regional tourism organisation _____ Individual wineries _____
 Wine industry associations _____ Other (please specify) _____

32. Alliances

What type of relationship, if any, **DO YOU HAVE** with the following organisations?

(Please circle corresponding number for each question or state other relationship)

None Contact as Member Co-operative Other
 or state other relationship Required marketing or relationship
 (please state)

a) Tourism New Zealand	1	2	3	4	_____
b) Regional Tourism Organisation	1	2	3	4	_____
c) New Zealand Winegrowers		1	2	3	4 _____
d) NZGVIG	1	2	3	4	_____
e) Regional Grape Growers Organisation			1	2	3 4 _____
f) NZ Society of Viticulture and Oenology			1	2	3 4 _____
g) Regional Wine Organisation			1	2	3 4 _____
h) Visitor Information Centres	1	2	3	4	_____
i) Tourism Industry Association of NZ	1	2	3	4	_____
j) 100% Pure New Zealand	1	2	3	4	_____
k) Business Development Boards	1	2	3	4	_____
l) Local Council	1	2	3	4	_____
m) Regional Council	1	2	3	4	_____
n) Trade New Zealand	1	2	3	4	_____
o) Chamber of Commerce	1	2	3	4	_____
p) Industry New Zealand	1	2	3	4	_____
q) Ministry of Economic Development			1	2	3 4 _____
r) Other Central Government Agencies	1	2	3	4	_____
s) Hospitality associations	1	2	3	4	_____
t) Local food and wine promotion group/network			1	2	3 4 _____
u) Other (<i>please state</i>)	1	2	3	4	_____

OTHER PROMOTIONS

What other promotional activities would you like to see conducted to promote tourism to the wineries in your region?

Do you have any comments on wine tourism that have not been covered by this survey, or that you feel are particularly important for your winery, your wine region, or wine tourism in New Zealand?

Your completion of this questionnaire is greatly appreciated. Your response will assist in helping us understand winery characteristics and the emphasis New Zealand wineries place on wine tourism.

NOTE: If you wish to be included in the draw outlined in the covering letter, and/or receive a copy of the results of this research, please ensure you complete the personal details section accompanying this questionnaire.

PERSONAL DETAILS

PLEASE NOTE: All responses will be treated in the strictest confidence. Any results published will be in aggregate form only, thus ensuring the privacy and protection of all respondents, both individually and within a particular region.

Do you wish to receive a copy of the survey results? Yes No

If yes, how do you wish to receive them? Post Email (please state email address)

Book and book voucher draw

Do you wish to be included in the draw for the book and book voucher? Yes No

Further surveys

Would you be willing to participate in further surveys Yes No

Your Name

Your
organisation

Your title or
position

Once again, thank you for completing this questionnaire. It is hoped that at some time in the future this research will benefit both yourselves and the wine industry as a whole.