INTRODUCING WINE TOURISM

This report provides an overview of tourists that visit wineries as an activity during their visit to New Zealand. The report includes trends and characteristics of these international wine tourists.

Visiting wineries is a popular activity for international tourists. New Zealand offers a variety of world class wineries, located in numerous growing regions throughout both the North and South Islands.

Wine tourists are defined as international visitors, aged 18 years and over, who participate in some form of winery visit at least once while travelling in New Zealand.

As a priority Special Interest, Tourism New Zealand is focusing future marketing activity on attracting more international tourists to New Zealand to participate in food and wine based holidays.

TRENDS IN WINE TOURISM

How many tourists visit wineries while in NZ?

In the last five years New Zealand’s vineyards and wineries have seen over a million international visitors at an average of 220,000 per year. In total, 13% of all international holiday travellers visit a winery or participate in wine tourism activities annually.

Markets that provide the most wine tourists include Australia, USA, UK and Germany. 2010 was a peak year for wine visitors and numbers have kept above 200,000 over the last 5 years (as shown in Fig 1, graph below).

With continued support and contributions from industry partners, it is anticipated that international tourism visitor numbers will continue to be strong, offering significant growth opportunities for future wine tourism in New Zealand.

How much do international wine tourists spend on their trip in New Zealand?

Winery tourists spend significantly more than a typical visitor during their trip to New Zealand. This is especially evident at the higher end of average spending.

On average, international tourists that participate in wine tourism spend $3,700 compared to the $2,800 average spend of all visitors. There is a significant high value segment in the wine tourism market with over 22% of international wine tourists saying they spend over $5,000 on their visit to New Zealand.

Figure 2: Expenditure, 2009-13

![Image: Karikari Estate]
Where do wine tourists visit vineyards?
The graph below looks at where wine tourists visit vineyards. This graph shows the average annual number of wine visitors to New Zealand’s Regional Tourism Organisations (RTO’s) over a five year period. Marlborough had the highest number of international tourists visiting wineries (43,000), followed by Auckland (30,000) and Hawkes Bay (24,800). Queenstown (21,100) and Nelson (8,300) round out the top five, while Wairarapa (7,900), Canterbury (5,200), Hurunui (5,000), Central Otago (4,100), and Lake Wanaka (3,500) close out the top ten.

Figure 4: Where wine tourists visit vineyards, 2009-13

CHARACTERISTICS OF WINE TOURISTS
Where do wine tourists come from?
Over a five year average, the international markets that provide the most wine tourists to New Zealand per year include Australia (47,500), USA (22,200) and UK (20,700).

Other important markets include Germany (6,400), Japan (6,100), and Canada (5,700). Western markets dominate participation in wine tourism, but there is strong growth in the Asian markets.

Figure 5: Where Wine Tourists Come From, 2009-13

As a proportion of the total market visitation, Scandinavian countries show the highest propensity to visit wineries while in New Zealand. 24% of Swedish visitors were wine tourists, followed by Finland (21%), Canada (20%), Denmark (19%), England (18%) and USA (18%).

With Belgium (18%), Northern Ireland (18%), Wales (17%) and France (16%) rounding out the top ten markets, it is clear that Western nations show the highest propensity to visit wineries while in New Zealand.

Figure 6: Propensity of International Wine Tourists by Market, 2009-13

What is the age profile of wine tourists?
The age profile of international wine visitor’s highlights a strong mature youth segment aged 25 to 34 (26%). There is then a clear drop through the years when people typically raise families, before the next second strongest age group of 55-64 (23%).

Figure 7: Age of Winery Tourists, 2009-13
There is a slight bias towards females with 53% of international wine tourists being female compared to 47% being male.

As with the age profile (see Fig 7) this graph highlights a preference to travel as a couple, without children or dependants.

What information do wine tourists seek before they arrive?
Over 200,000 visitors to newzealand.com specifically access food and wine information. On average, visits to the food and wine hub only last 1:51s, below the total average time of 3:06s.

Traffic to the website by wine visitors shows no seasonal bias, suggesting that wine tourist visitors to the site follow the normal peak and seasonal trends with no noticeable variation.

What other content do wine visitors to newzealand.com view?
There is a lower amount of related searches for wine tourists. The majority of other content searched suggests a focus on the individual food and wine regions rather than alternative activities. The most popular referrals from the site (extra clicks on links provided) include wine tour information and group travel, and cruises involving nature discovery.

Tourists most likely to view wine content on newzealand.com come from the USA (2.28%), Canada (2.26%), Australia (2.20%), UK (2.07%) and Japan (1.85%). New Zealand domestic users are fifth (1.39%), while Germany and China both index less than 1%.

Who do wine tourists travel with?
International wine tourists are predominantly travelling as a couple, with 51% of visitors travelling with a partner or spouse. Wine tourism visitors are less likely than the norm to travel alone, with 18% travelling by themselves. Just over 11% travel with friends, slightly higher than the norm for international visitors, while travelling with family/whanau is lower than normal at just over 10%.

60% of international wine tourists travelled in a pair, matching figures from above. 18% travelled alone, 5% in a group of three people, 6% travelled in a group of four and 10% travelled in a group of five or more. (see graph over page)
What are the main purposes of visit for wine tourists?

International wine tourists are predominantly holiday visitors (63%). There is also a significant VFR segment, at 25% of the market. Only 6% of wine tourists are in New Zealand on business (as their main purpose of visit) and 2% are here for education.

How long do international wine tourists stay in New Zealand?

Because wine tourists are generally from Western markets (which stay in New Zealand longer than average) their length of stay is also significantly longer, with an average of 18.6 days, compared with a total visitor average of 14.4 days. 10% stayed in New Zealand for a month or more, with 27% staying above twenty days. When combined, 36% stayed for more than ten and less than twenty nights.

What accommodation types do wine tourists use?

The most common accommodation types used by wine visitors are hotels (66%) and motels (40%). The next most common is privately owned dwellings (25%) followed by guest and hosted (21%). Holiday parks/campgrounds (20%), while 18% of wine visitors stay in a backpackers. There is evidence of a growing luxury market with 10% of wine tourists staying at resorts, luxury lodges and retreats.
What other activities do wine tourists do?

International wine visitors tend to be most interested in art and cultural tourism activities during their stay in New Zealand. The top ten activities that they tend to over index on (i.e. are more likely than the typical visitor to participate in) include arts and crafts, whale watching, wildlife encounters and cycle sports.

The activity preferences highlight that this segment has a more relaxed style of holiday, with a focus more on nature and cultural activities rather than adventure activities.

Figure 15: Top Ten Activities Wine Tourists Over Index On, 2009-13 

- (9%) Arts And Crafts
- (10%) Whale Watching
- (27%) Wildlife Encounters
- (7%) Cycle Sports
- (16%) Sightseeing (Air)
- (15%) Dolphin Watching
- (4%) Golf
- (22%) Bird Watching
- (4%) Major Art/Culture Event
- (53%) Museums And Galleries

How satisfied are international wine tourists?

New Zealand typically delivers high satisfaction for international holiday tourists and this is no different for wine tourism.

Wine visitors, with an average rating of 9.2 out of a possible 10, tend to be slightly more satisfied with their visit to New Zealand than the average visitors, who average 8.9 for overall satisfaction. South Africa (9.4) offers the best overall rating followed by England, USA, Canada and Australia, who all offer rating averages above 9.

Figure 17: Satisfaction of Wine Tourists, 2009-13

What transport do wine tourists use?

The most common transport option used by international wine tourists is a car/van (66%). Commercial ferry/boat (37%) is the second most popular method, representing secluded winery destinations, such as Waiheke Island, which is located in Auckland’s Hauraki Gulf. Scheduled coach service (35%), although slightly below the average for all international tourists, was the third highest used mode of transport.

Figure 16: Transport Used, 2009-13

*1 IVS: Statistics New Zealand - International Visitor Survey, YE Jun 2009 - YE Jun 2013 (Holiday Only)
*2 newzealand.com analytics via Adobe Site Catalyst