



### Definition

Wine visitors are defined as domestic or international visitors who visited at least one winery during a trip in Australia.

### How many travellers visit wineries?

In 2004 there were over 4.6 million visitors who visited a winery while travelling in Australia. Most of these visitors were domestic visitors (Table 1).

In 2004, 12 per cent of international visitors, 3 per cent of domestic overnight visitors and 1 per cent of domestic day visitors were wine visitors.

### What are the recent trends?

Between 1999 and 2004 the number of visitors who visited a winery while travelling in Australia varied across markets. Domestic overnight and international wine visitors increased, while the number of domestic day wine visitors remained flat. This compares with a strong decline in total domestic day visitors (Table 1).

Table 1 Visits to wineries, 1999–2004

Wine visitors	1999	2000	2001	2002	2003	2004
	000					
Domestic overnight	1 939	1 854	1 938	2 059	2 283	2 369
Domestic day	1 647	1 756	1 608	1 935	2 051	1 680
International	428	437	480	486	524	579

### Where do they go?

In 2004 Australia's South West (WA) attracted the most domestic overnight wine visitors, with 19 per cent of these visitors visiting this region. On average over 2003 and 2004, the Hunter (NSW) attracted the most domestic day wine visitors, with 14 per cent of these visitors visiting the region.

In 2004 Sydney (NSW) was the main stopover region for international wine visitors to Australia and international visitors in general. Considering Sydney receives the largest share of international visitors, this result is to be expected.

Domestic and international visitors to the Barossa (SA) were more likely to visit a winery compared to other regions. In 2004, 43 per cent of domestic overnight visitors, 28 per cent (average over 2003 and 2004) of domestic day visitors and 68 per cent of international visitors to the region visited at least one winery while travelling in Australia.

### Where do they come from?

The majority of domestic overnight (65 per cent) and day wine (97 per cent) visitors travelled within their state of residence in 2004.

Over a fifth of international wine visitors were from the United Kingdom (UK) (Table 2). Visitors from the United Kingdom and Canada had the greatest propensity to be wine visitors with 22 per cent of visitors from each of these countries having visited at least one winery while travelling in Australia.

Table 2 Country/region of origin for international wine visitors, 2004

Country/region of origin	Wine visitors	Propensity <sup>a</sup> Per cent	Expenditure	
			Per visitor	Per night
	000		\$	\$
United Kingdom	137	22	3 888	66
Germany	28	20	5 237	66
Other Europe	69	17	5 841	73
Japan	56	8	3 733	77
Malaysia	22	15	3 561	81
Korea	22	12	4 079	97
China	21	9	5 297	84
Other Asia	60	9	2 863	98
USA	60	15	3 221	101
Canada	21	22	3 499	69
New Zealand	64	7	2 291	95
Other countries	21	8	4 596	63
Total	579	12	3 873	76

<sup>a</sup> Wine visitors as a percentage of total visitors from each country.

### How much do they spend?

Domestic visitors who visited at least one winery while travelling in Australia, spent \$2.4 billion in 2004 (Table 3). Domestic wine visitors spent notably more per visitor on accommodation, takeaways/restaurant meals, shopping and alcohol/drinks compared to other visitors. The largest difference was with alcohol/drinks, with domestic overnight wine visitors spending 2.3 times more on alcohol/drinks and domestic day wine visitors 5.9 times more on alcohol/drinks compared to other visitors.

In 2004 international wine visitors spent \$2.2 billion while travelling in Australia. Forty six per cent of this expenditure was on accommodation, food and drink, with international wine visitors spending on average \$1 764 on these items. International wine visitors spent more on all items compared

to other international visitors in 2004. The largest difference was with organised tours and airfares, with international wine visitors spending 2.3 and 2.4 times more respectively than other visitors while travelling in Australia.

Table 3 Expenditure by domestic wine and other domestic visitors, 2004

Expenditure Item	Overnight		Day	
	Wine visitors	Other visitors	Wine visitors	Other visitors
	Expenditure per visitor (\$)			
Accommodation (can include food)	244	115	-	-
Transport	119	77	17	21
Takeaways, restaurant meals	152	80	34	15
Shopping	134	65	37	28
Airfares	70	57	-	-
Alcohol/drinks	68	29	20	3
Other	143	102	8	15
Total per visitor	929	525	116	86
Total expenditure (\$ million)	2 200	37 755	194	10 947

International wine visitors from Europe (excluding Germany and the United Kingdom) had the largest expenditure per visitor in 2004 (\$5 841 per visitor) and international wine visitors from USA had the largest expenditure per night (\$101 per night) (Table 2).

### Why are they travelling?

In 2004 the majority of wine visitors travelling in Australia travelled for the purpose of a holiday, accounting for 66 per cent of domestic overnight, 84 per cent of domestic day and 59 per cent of international visitors.

In 2004 more than seven in ten overnight wine visitors took their trip 'to experience food and wine'. In contrast only two in ten overnight visitors who did not visit a winery on their trip suggested this as the reason for their trip. Furthermore 89 per cent of overnight wine visitors took their trip 'to escape and unwind' and 77 per cent took their trip 'to tour around or explore'.

## Who are they?

A higher proportion of domestic overnight and international wine visitors travelled as an adult couple in 2004 compared to other visitors (Table 4 and Table 5).

**Table 4 Domestic wine and other domestic visitors by travel party description, 2004**

Travel party description	Proportion <sup>a</sup>		Average stay		Expenditure	
	Wine visitors	Other visitors	Wine visitors	Other visitors	Wine visitors	Other visitors
	Per cent		Nights		Per night (\$)	
Travelling alone	9	27	6.5	3.6	152	124
Adult couple	47	28	5.6	4.4	173	129
Family group	17	19	6.6	4.4	167	142
Friends and/or relatives with children	6	6	6.0	3.7	137	128
Friends and/or relatives without children	18	15	4.0	3.5	170	127

<sup>a</sup> Proportion of domestic wine and other domestic visitors

**Table 5 International wine and other international visitors by travel party description, 2004**

Travel party description	Proportion <sup>a</sup>		Average stay		Expenditure	
	Wine visitors	Other visitors	Wine visitors	Other visitors	Wine visitors	Other visitors
	Per cent		Nights		Per night (\$)	
Travelling alone	44	48	81	34	72	91
Adult couple	35	26	28	17	84	94
Family group	8	11	18	11	98	105
Friends and/or relatives with children	10	10	32	19	91	98
Friends and/or relatives without children	2	5	21	7	80	154

<sup>a</sup> Proportion of international wine and other international visitors

The majority of domestic overnight wine visitors who travelled as an adult couple were aged over 45 years (61 per cent), working full-time (54 per cent) and had an annual household income above \$52 000 per annum (67 per cent).

The majority of international wine visitors who travelled as an adult couple were aged over 45 years (66 per cent) and over a quarter of them were from the United Kingdom.

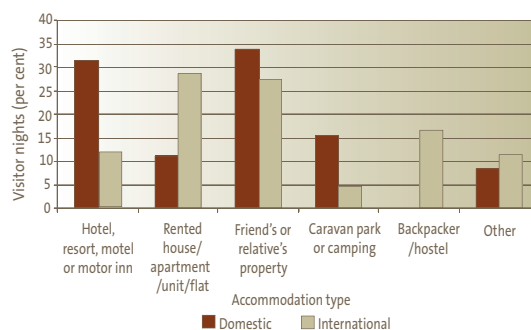
Popular information sources used by domestic overnight wine visitors in 2004 were previous experience (51 per cent), internet (35 per cent), friends or relatives (22 per cent), travel books, guides or brochures (16 per cent) and tourist offices/visitor information centres (11 per cent). Sources used by international wine visitors were friends or relatives (41 per cent), internet (36 per cent), travel books or guides (28 per cent) and travel agents (27 per cent).

The main reasons why international wine visitors used the internet were to find out more about Australia after they decided to visit, to help plan their trip itinerary and to find out more about accommodation in Australia.

## Where do they stay?

Staying at a friend's or relative's property was the most popular type of accommodation for domestic wine visitors in 2004, whereas staying in a rented house or apartment was the most popular type of accommodation for international wine visitors.

**Figure 1 Domestic and international wine visitor nights by accommodation type, 2004**



## How many nights do they spend travelling?

Both domestic and international wine visitors had longer overnight trips in Australia in 2004 compared to other domestic and international visitors. This was the case for all age groups (Table 6).

## What else do they do?

Eating out and sightseeing were the most popular activities undertaken by domestic day and overnight wine visitors, while over 90 per cent of international wine visitors went shopping for pleasure.

**Table 6 Average length of stay by age for domestic and international wine and other visitors, 2004**

Age group Years	Domestic		International	
	Wine visitors	Other visitors	Wine visitors	Other visitors
	Nights			
15–24	3.7	3.5	103.2	53.2
25–34	4.7	3.4	74.0	25.4
35–44	5.1	3.4	24.3	13.2
45–54	5.1	3.7	20.9	13.2
55+	7.0	5.4	30.0	20.0
Total visitors	5.5	3.9	50.9	24.2

## What is happening to supply?

As of April 2005, there were 1 490 wineries with cellar door facilities, six per cent more wineries than in March 2004. The state with the largest number of wineries with cellar door facilities was Victoria. Of those wineries with cellar door facilities, 39 per cent of them had an on-site restaurant/served light meals, 74 more wineries compared to March 2004. This indicates the increasing role of wineries in integrating tourism with the food and wine experience (Table 7).

**Table 7 Winery facilities by state/territory, April 2005**

State/ territory	Wineries	Cellar door facilities	On-site	On-site
			restaurant/ served light meals	accommodation
VIC	560	457	184	46
SA	471	292	92	31
NSW/ ACT	408	344	133	64
WA	282	236	83	30
QLD	100	93	71	24
TAS	77	67	22	9
NT	1	1	-	-
Australia	1 899	1 490	585	204

Source: Winetitles wine industry database, 2005.

The data included in this snapshot is mainly sourced from Tourism Research Australia's National Visitor Survey and International Visitor Survey, 2004.

Sources used: Tourism Research Australia, National Visitor Survey and International Visitor Survey, various years, (unpublished data), TRA, Canberra.

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