

# MARKET RESEARCH REPORT

## PROJECT CELLAR DOOR CONSUMER RESEARCH

Prepared for:

***TOURISM NEW SOUTH WALES***

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MARKET & COMMUNICATIONS RESEARCH

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## **EXECUTIVE SUMMARY**

- In the second half of 2003, 546 visitors to the wine regions of the Hunter Valley and Mudgee completed a survey to determine what makes 'an excellent cellar door experience' and to gather information on visitor behaviour at cellar doors.
- Regression modelling determined that seven items are important for customer satisfaction at cellar doors. They are:
  - the cellar door has great atmosphere
  - staff offer useful tips about things to do in the area
  - there is a good range of wine to taste
  - customers will consider buying wines from the winery in future
  - the cellar door caters well for children
  - there is good road signage for wineries in the area, and
  - staff are friendly.
- While catering for children had an impact on satisfaction, only 8% of visitors were with children 17 years or younger. This suggests that those with children find the provision of childcare facilities highly important.
- Household income is a strong indicator of propensity to visit a wine region. In both wine areas studied, visitation increased with higher household income levels.
- The age range for visitors was 25–64 years. This is a very broad range and indicates the wide appeal of the cellar door experience.
- Visitors came from a wide variety of household types. About half of all visitors travelled as couples. 'Adult friends' accounted for a further quarter of visitors.
- Visitors to NSW wine regions mostly came from NSW, with about one-fifth of visitors from other states of Australia and overseas.
- Planning cellar door visits is an important part of the experience. Over half of all visitors sought advice for their visit.
- The same number pre-booked for things like accommodation, restaurants, transport etc. Bookings made by either internet or directly with the operator account for about 40% each (88% total).
- While 'learning about wine' is an important part of the cellar door experience, the main reason for visiting is for 'leisure/recreation' and 'to taste the wines and perhaps buy some'. Visitors do not consider themselves wine experts with most rating their knowledge at 5.06 on a 0–10 scale.

- Australian residents who visited cellar doors during this survey regularly visit wine areas. Only 16% of visitors were making their first trip to an Australian wine growing area in the last 12 months at the time of the interview. In contrast, 37% of overseas visitors were making their first trip to an Australian wine area in the last 12 months.
- Just under one-third of visitors are currently members of a wine club—most of which are operated by cellar doors. In our sample there were over 100 wine clubs named, which suggests this market is crowded. Only one-third of visitors were in any way interested in joining a cellar door wine club. 60% specifically said they were 'not interested at all'. This result shows why many cellar doors have found it difficult to establish and maintain a successful wine club. Of those who did not want to join a cellar door wine club, only 17% are currently members of another wine club.
- Despite limited opportunities to establish successful cellar door wine clubs, there is long-term value in attracting visitors to cellar doors. 67% of visitors claim to have bought wine in a bottle shop or restaurant that they had tried initially at a cellar door—cellar door visits generate future retail sales.
- Visitors participate in a wide range of activities other than tasting and purchasing wine. Entertainment, local produce and restaurants all play an important part in the whole experience.
- On average, 3.07 cellar doors were visited each day of the visit.
- Average daily expenditure on wine per party member was \$109. At each cellar door where purchases were made the average was \$45, accommodation was \$60, and \$35 was spent each day on food.

## TABLE OF CONTENTS

|                                          | <b>Page</b> |
|------------------------------------------|-------------|
| EXECUTIVE SUMMARY.....                   | i           |
| 1.0 PROJECT OVERVIEW .....               | 1           |
| 2.0 APPROACH AND METHODOLOGY.....        | 2           |
| 2.1 Sample.....                          | 2           |
| 2.2 Data Collection.....                 | 3           |
| 3.0 ANALYSIS .....                       | 4           |
| 4.0 REPORT .....                         | 5           |
| 4.1 Who Is The Cellar Door Visitor?..... | 5           |
| 4.2 Trip Preparation And Planning .....  | 14          |
| 4.3 The Role Of Wine .....               | 23          |
| 4.4 The Cellar Door Experience .....     | 28          |
| 4.5 A Model Of Satisfaction .....        | 38          |
| 4.6 Expenditure.....                     | 41          |
| APPENDIX 1—See Australia Categories      |             |
| APPENDIX 2—Questionnaire                 |             |
| APPENDIX 3—Regression Analysis           |             |

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## **1.0 PROJECT OVERVIEW**

The Cellar Door Study is a survey of consumers at cellar doors in New South Wales (NSW). The aim of the research was

- to determine the nature of visits to cellar doors
- the satisfaction of the overall experience, and
- the importance of experience elements at cellar doors in driving satisfaction.

The outcome of the research will provide cellar doors with information to allow them to develop their cellar door operations further, and through this to increase wine sales.

The research project also meets the strategic theme of Tourism NSW to 'partner with industry to help improve its viability and service delivery'.

There is sometimes debate about whether cellar doors are part of the tourism industry or the wine industry. This study looks at both the wine and tourism aspects of cellar door visitation.

NSW is estimated to have over 210 wineries with cellar doors. The number of estimated visits to NSW wineries in 2001 was 4.1 million. This study found that each person visited an average of 6.62 wineries per trip, which means there were 619,335 individual 'trips' to wine areas in NSW in 2001.

Approximately 2,800 people are employed in NSW wineries in various roles including grape growing/wine making, cellar door services, restaurant and food services and accommodation. 35% of these are employed in visitor services and retail operations. The estimated turnover of wineries with cellar doors in NSW was \$92.9 million in 2001.

The wine market has not increased greatly in recent years. Domestic sales of Australian-produced wine have risen from 384 million litres in 2000/01 to 401 million litres in 2002/03—an increase of only 5%.

The objectives of the research were to:

- gain insight into the consumer experience of visiting cellar doors
- gain insight into how to improve the cellar door experience for the consumer
- facilitate the integration of cellar door operators into the tourism industry.

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## **2.0 APPROACH AND METHODOLOGY**

### **2.1 Sample**

546 interviews were completed with visitors to wineries in the Hunter Valley and Mudgee in NSW. This sample size gives a confidence level of  $\pm 4.19\%$  at the 95% confidence level. 341 responses were from Hunter Valley winery visits and 205 from Mudgee winery visits.

Wineries were randomly selected from all wineries in each of these areas, then contacted and asked to participate. Participating wineries ranged from large to small operators. 30 wineries were recruited, however this number was reduced to 23 participating wineries after briefing and training.

Participating cellar doors were:

**Hunter Valley (38%)**

De Bortoli Black Creek Winery  
Yarraman Estate  
Drayton's Family Wines  
Bimbadgen Estate  
Oakvale Wines  
Tyrrell's Vineyards  
Tamburlaine  
Capercaillie Wine Company  
Mt Pleasant Wines  
Kevin Sobels Wines  
Tower Estate  
Wandin Valley Estate  
Hungerford Hill Wines  
Warraroong Estate  
Vinden Estate

**Mudgee (62%)**

5 Corners Wines  
Vinifera Wines  
Thistle Hill  
Lowe Family Wine Co.  
Frog Rock Wines  
Mansfield Wines  
Abercorn  
Poet's Corner Wines

Special thanks is extended to the owners, operators and staff of participating cellar doors for their assistance in this project.

## 2.2 Data Collection

Data was collected in two ways:

- face-to-face interviewing, and
- a self completion survey.

207 face-to-face interviews were carried out by staff of each participating winery using Computer Assisted Personal Interviewing (CAPI). With this technique the interview is recorded on a small hand-held computer. This approach means that interviewing is improved by:

- faster interviewing completion time
- the program holding all skips and jumps allowing cellar door staff to complete the interviews, and
- lower cost of fieldwork.

It was anticipated that each winery would be able to collect a minimum of 50 interviews, however this number was unable to be met. Subsequent follow-up of wineries found the lower sample size came from:

- surveys taking too long because:
  - cellar door staff often spent over an hour with respondents prior to the survey—this meant that respondents were very ‘chatty’ when answering questions, thus taking a longer time to complete the interview
  - the number of questions included in the survey
- almost all visits and associated selling is completed on weekends, and wineries put a priority on sales rather than interviewing.

These problems resulted in an average of only nine interviews using the CAPI device per cellar door.

To increase this sample size, interviewing was completed by using paper-based self-completion questionnaires. With this approach, cellar door staff asked visitors if they would complete the questionnaire. Those who agreed were given a pen, the survey and a reply-paid envelope. They could either complete the survey at the cellar door and deposit it in the collection bin provided, deposit it in the collection bin of another participating cellar door, or mail the envelope to Tourism NSW in the reply paid envelope at no cost to the sender. An incentive prize of one case of wine was also offered.

Through this methodology a further 339 surveys were completed making a total of 546 completed interviews.

### **3.0 ANALYSIS**

Analysis was carried out using:

- cross-tabulation analysis, and
- stepwise regression.

Cross-tabulation analysis used:

- region (Hunter/Mudgee)
- residential location (Sydney/other NSW/other Australia/overseas)
- sex
- age group
- occupation, and
- income.

Differences for these groups are only shown when they are both statistically significant and meaningful (e.g. a 1% difference may be significant but not meaningful).

## 4.0 REPORT

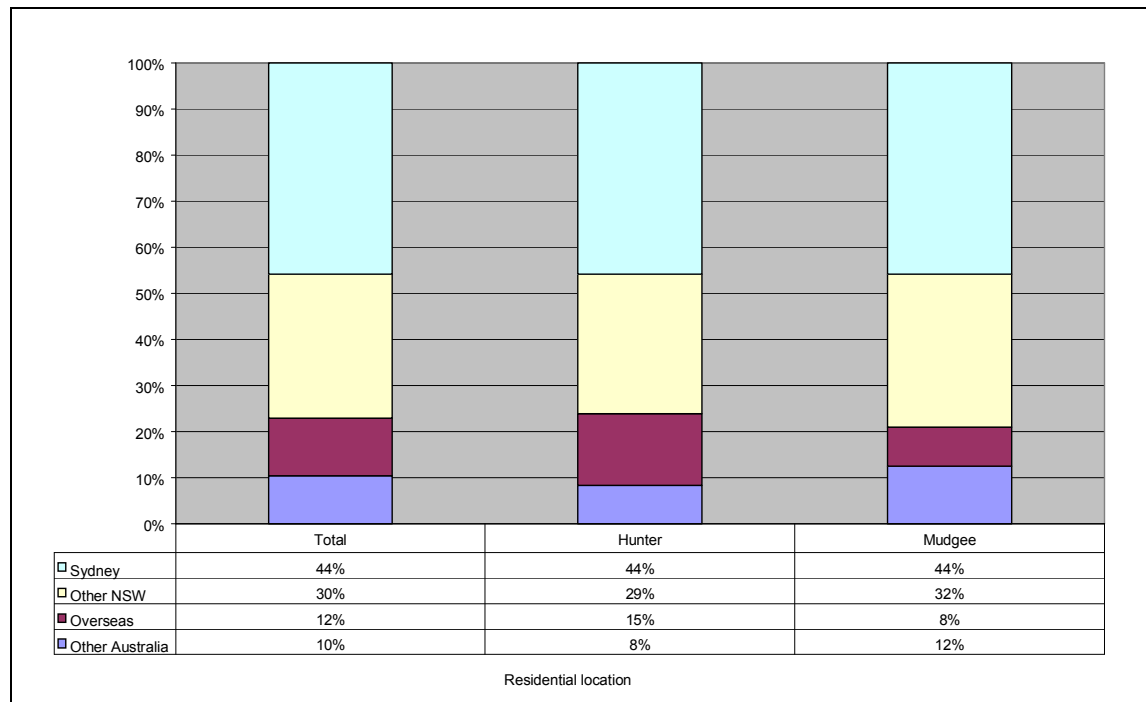
### 4.1 Who Is The Cellar Door Visitor?

◆ Cellar door visitors were asked their *residential location*.

Overall, 74% of visitors came from NSW. This varied between the two wine growing areas of the Hunter and Mudgee.

In the Hunter Valley, visitors from overseas (15%) were about double that of Mudgee.

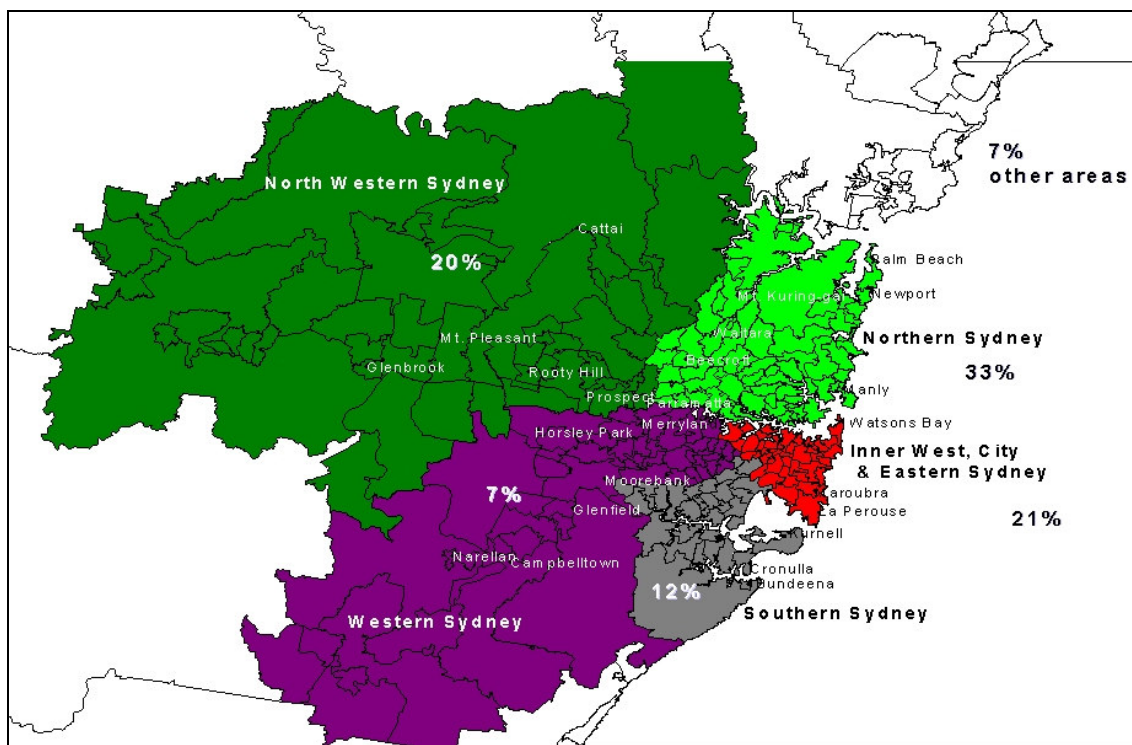
Residential Location—Chart 1



◆ Visitors who ***lived in Sydney*** came mainly from the northern areas of the city. This included north-western Sydney, northern Sydney, and the inner-west, city and eastern Sydney. These three areas account for three-quarters of visitors from Sydney.

There were low levels of visitation from western Sydney and southern Sydney, possibly because of the additional distance and time required to visit either of the wine growing areas.

**Where Sydney Residents Came From—Chart 2**



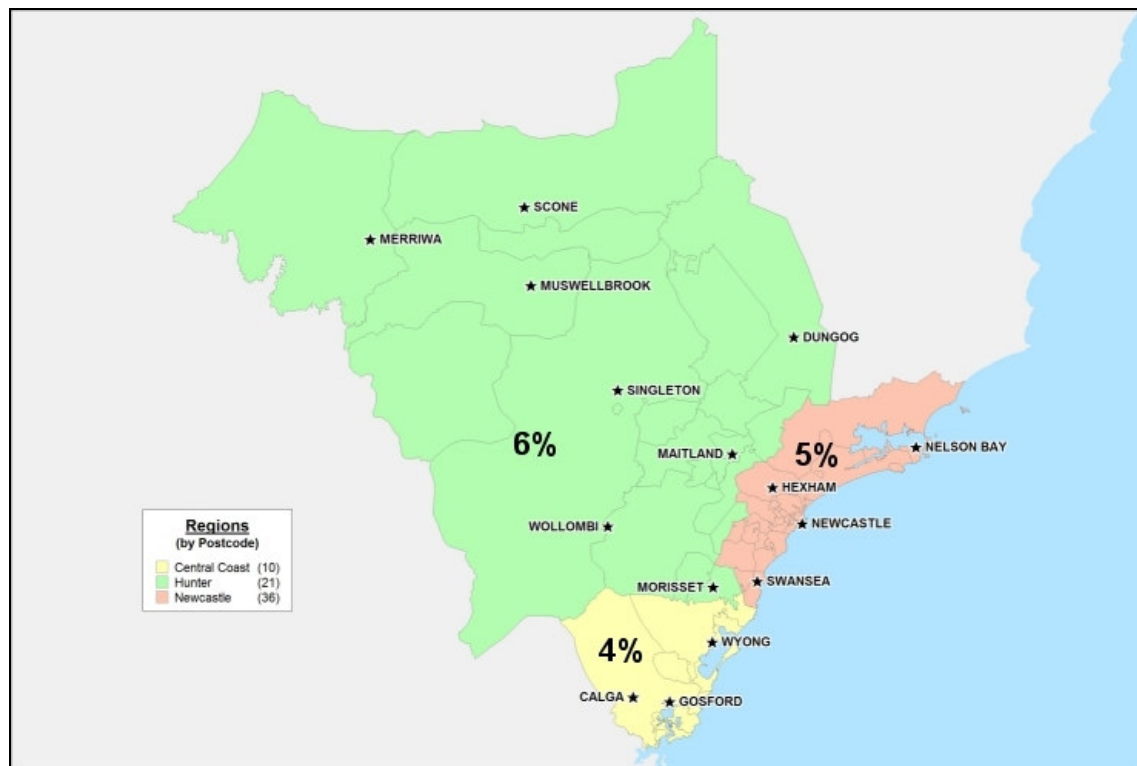
◆ It was initially thought that **visitors from 'elsewhere' in NSW** (30% of visitors) were likely to live in areas near the Hunter Valley and Mudgee.

Analysis shows that this was not the case:

- only 6% of visitors lived in the Hunter Valley
- 5% of visitors lived in Newcastle
- 4% lived on the Central Coast.

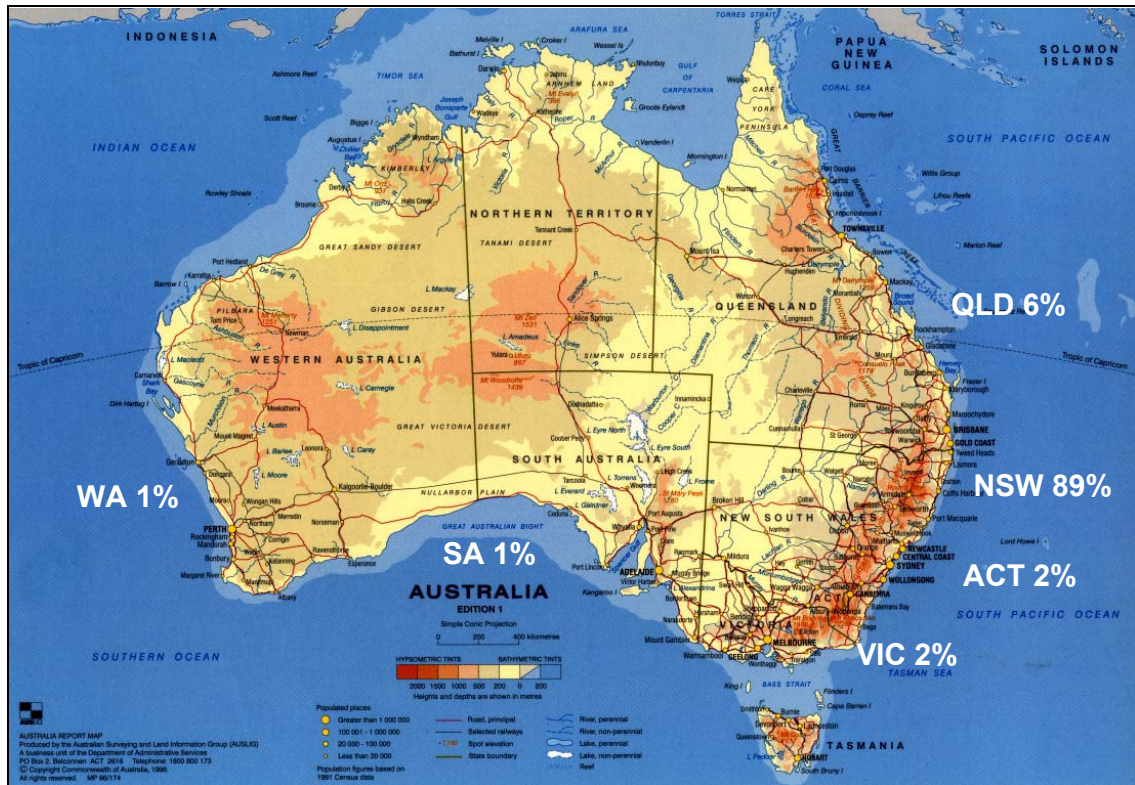
This left a further 15% visiting from 'other areas of NSW'.

**Visitors from the Hunter, Newcastle and Central Coast areas—Chart 3**



◆ Of the 10% of *those who lived in 'other areas of Australia'*, most were from the east coast, with only Queensland, ACT and Victoria making a significant contribution.

Where Australian Residents Came From—Chart 3A



◆ Just under half of overseas visitors came from the UK, with the USA, Canada and New Zealand making up a further 40%.

Overall, these four countries made up 88% of visitation to the Hunter Valley and Mudgee areas.

**Where Overseas Visitor From—Table 1**

| <b>Country</b> |     |
|----------------|-----|
| United Kingdom | 48% |
| USA            | 16% |
| Canada         | 12% |
| New Zealand    | 12% |
| Sweden         | 3%  |
| South Africa   | 3%  |
| Japan          | 1%  |
| France         | 1%  |
| Singapore      | 1%  |
| Hong Kong      | 1%  |

◆ Australian visitors were asked their *household income*.

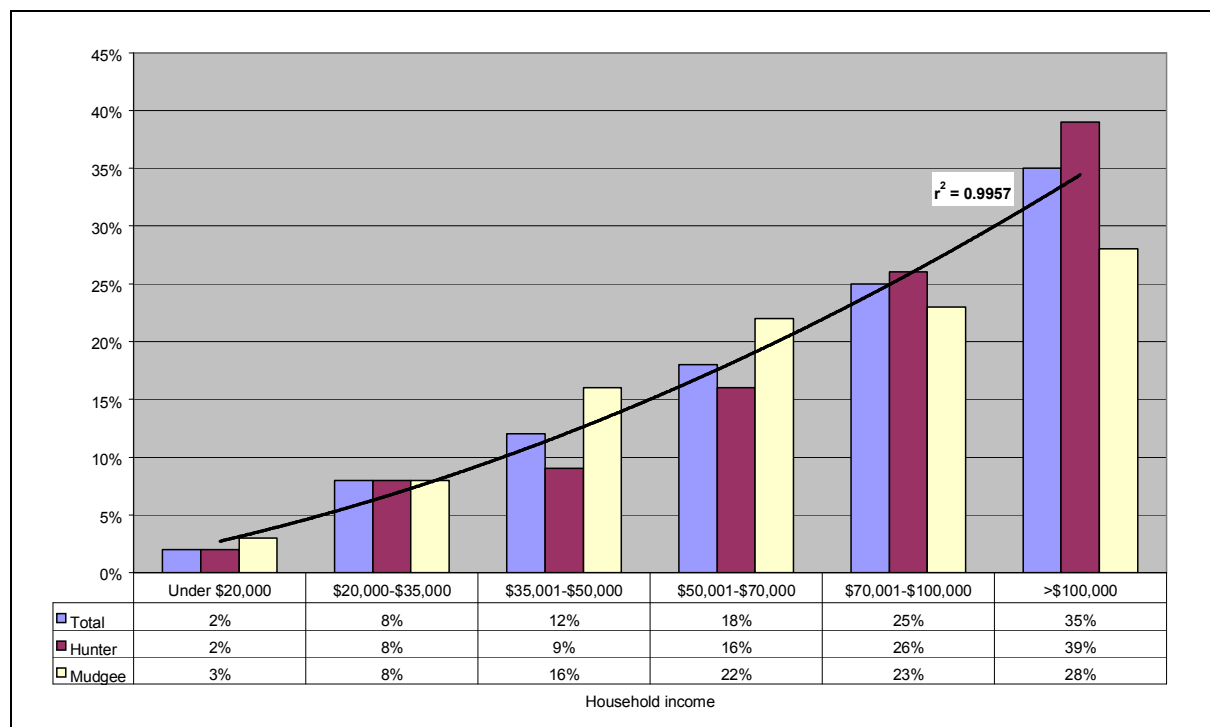
The chart below shows an extremely strong correlation between household income and interest in wine. A trend line has been added using polynomial regression which reveals an  $r^2$  value of .9957. This is an extremely strong correlation.

There are differences between the two wine growing areas:

- the Hunter Valley had a skew towards higher income
- the Mudgee area had a slightly lower income level for visitors.

This is one of a number of key differences between the two wine areas.

**Household Income—Chart 4**



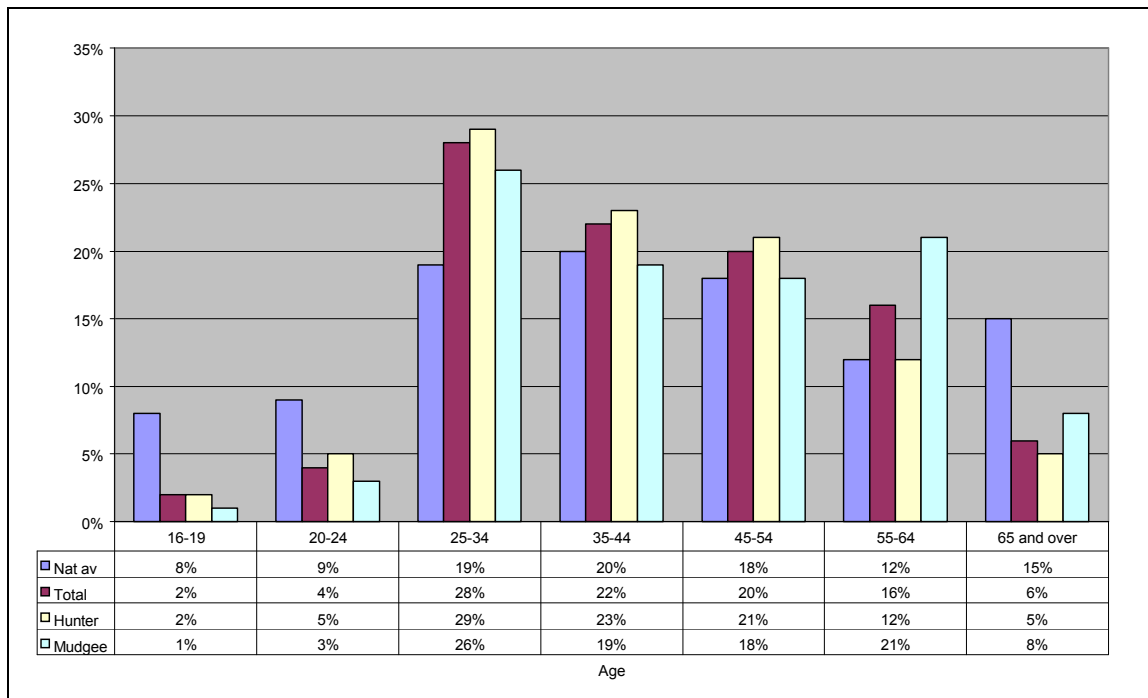
◆ Visitors to cellar doors were asked their **age**. Only those 16 years and over were interviewed. Age was categorised in seven age-ranges.

The chart below shows the national average age, the total age, and the age groups for visitors to each of the Hunter and Mudgee wine areas.

Wine areas are under-represented in the age groups of 24 and under, and 65 and over. Visitation was over-represented compared to the national average in all age groups between 25 and 64 years. This shows a very broad appeal to a wide range of ages.

Persons in the age group of 25–34 years were the most common visitors to wine areas. It could be speculated that this age group is in a position to afford wine, and is ready to learn more about wine. Slightly more of this group visited the Hunter region than Mudgee—though the differences are small.

**Age—Chart 5**



◆ **Sex of visitor** was recorded.

51% of visitors were men, 49% were women. This did not vary much between any of the analysed groups.

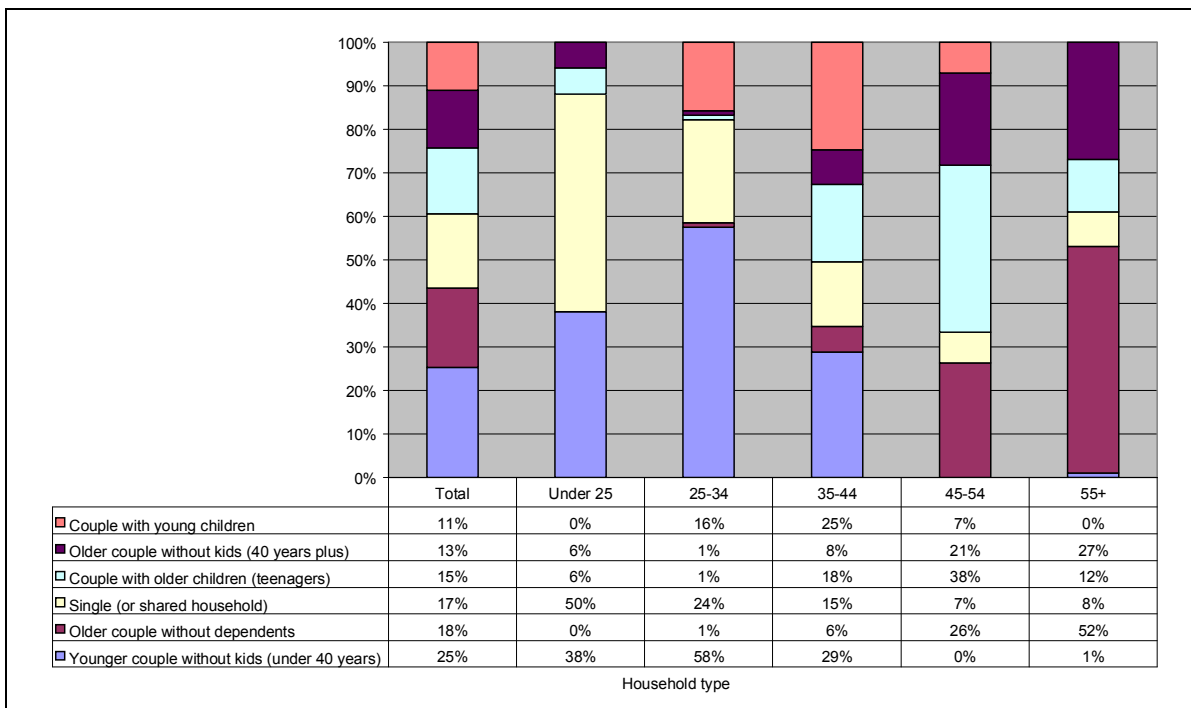
◆ The **occupation** of visitors was recorded. The overwhelming majority (79%) were in white collar occupations, a further 12% were in blue collar occupations, and 9% were not in the workforce. This last figure only applied to self-completion questionnaires where research staff were unable to code those not in the workforce into occupational groups.

◆ The **number of children with the group** was recorded. Only 8% of visitors had a member in their group 17 years or younger. Visitors to cellar doors were overwhelmingly adults, though later in this report we will see that there are some indications that catering for children could be an asset.

◆ The **type of household** was recorded:

- the largest group was where the household was ‘younger couple without kids (under 40 years)’—this group made up 25% of visitors
- in the 25–34 age group the ‘younger couple without kids’ made up 58% of visitors—this household type appears to be associated with new entrants to the cellar door market
- as age increased, so did the number of visitors who were ‘couple with older children (teenagers)’—in the 45–54 age group this accounted for 38% of visitors.

**Household Type—Chart 6**



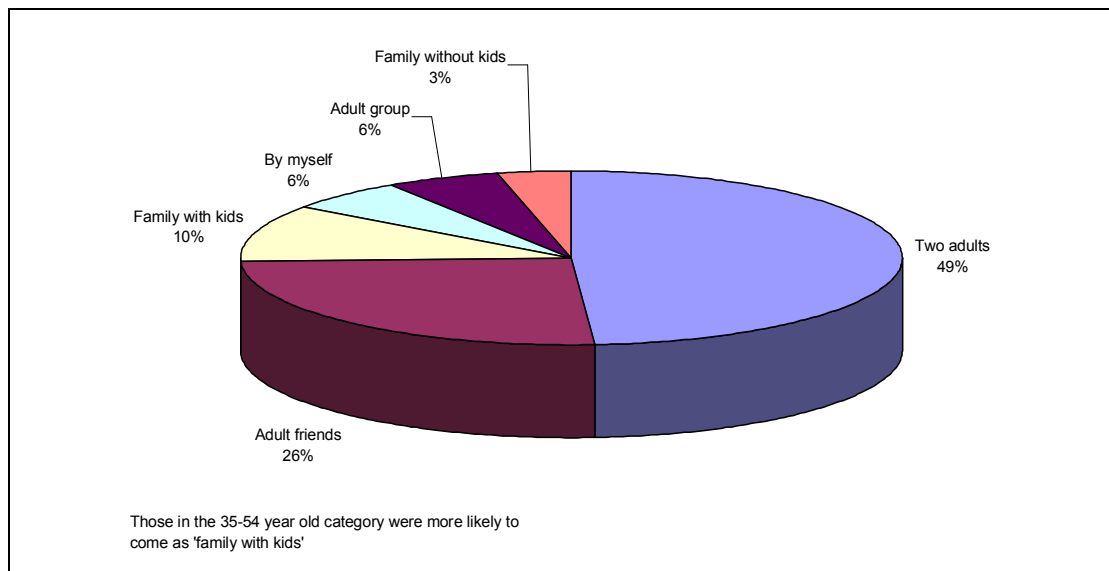
◆ The **type of group** in which respondents visited the wine areas was recorded. These categories were self-selected by research participants.

- Just under half of all visitors attended as ‘two adults’.
- A further quarter attended as ‘adult friends’.
- 10% attended as ‘family with kids’.

It should be noted that this last group of ‘family with kids’ at 10% is 2% more than the number of groups with a member 17 years or younger, as 2% of the sample, ‘kids’ could be older than 17 years.

The category of ‘adult group’ (6%) was made up of adults travelling together who were not friends, e.g. bus tour, club or organisation tour, etc.

**Group Category—Chart 7**

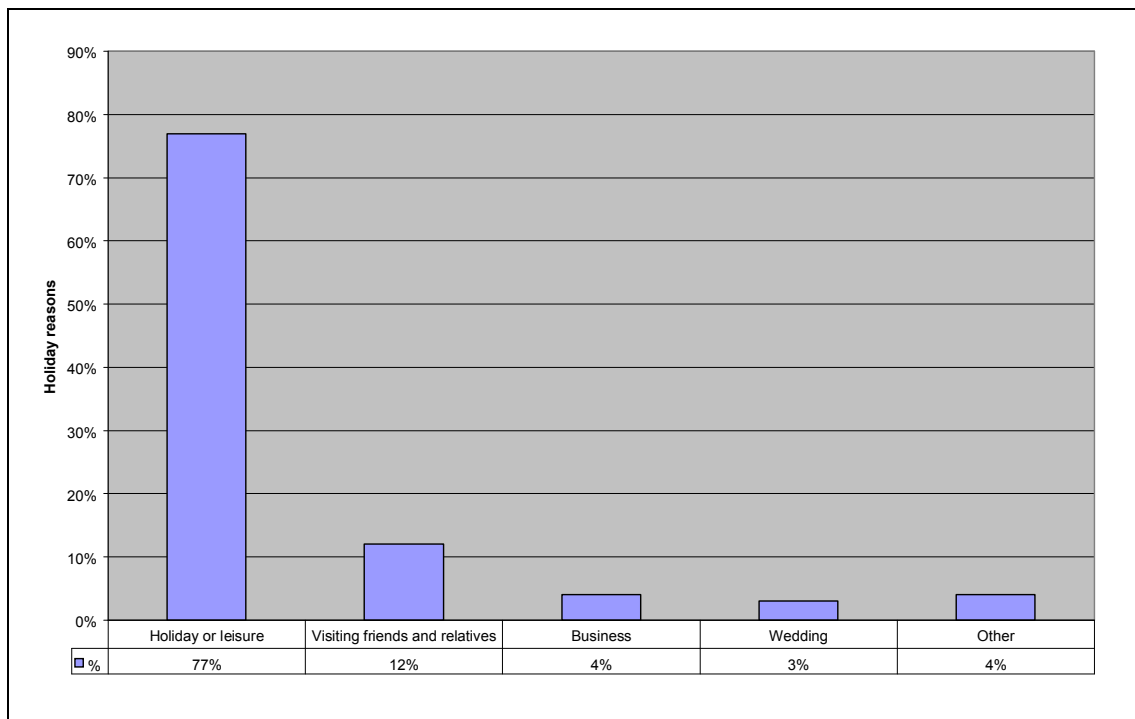


## 4.2 Trip Preparation And Planning

Visitors to cellar doors were asked the *main purpose of this trip*.

Around three-quarters of visitors were visiting for 'holiday or leisure', with a further 12% 'visiting friends and relatives'.

**Main Purpose Of Visit—Chart 8**



◆ Cellar door visitors were given a range of motivations for visiting cellar doors and were asked which was their *primary reason for this trip*.

The top three motivations for visiting accounted for 84% of visitation, though the more interesting results are possibly in some of the motivations with lower ratings:

- only 8% of visitors came 'to learn a bit more about wine'
- 7% came 'to experience the character, food and lifestyle of the region'.

The primary motivation for visiting wineries appears to be along the lines of a 'short break' style holiday rather than an educational or learning experience on the attributes of wine. This suggests that an engaging experience at the cellar door is more important than education taking place.

**Primary Reason For Trip—Table 2**

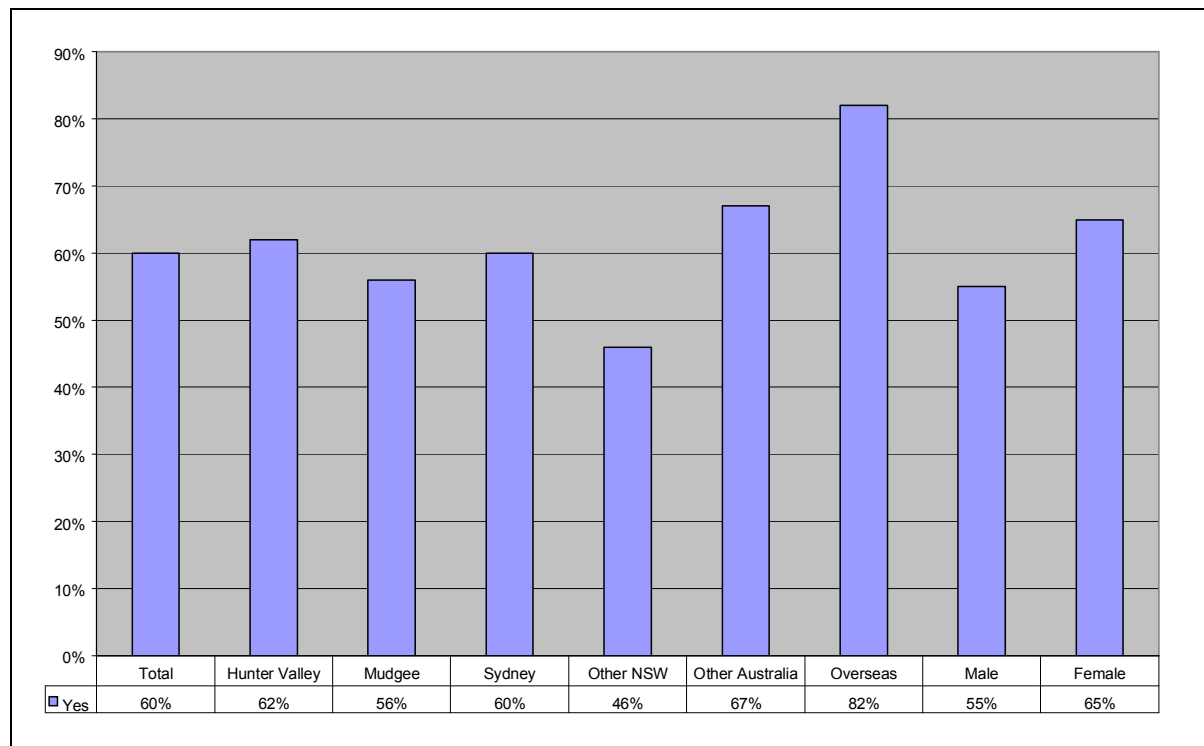
|                                                               |     |
|---------------------------------------------------------------|-----|
| Leisure/recreation                                            | 38% |
| To taste the wines and perhaps buy some                       | 31% |
| To spend time with relatives/friends                          | 15% |
| To have time to relax with partner                            | 9%  |
| To learn a bit more about wine                                | 8%  |
| To experience the character, food and lifestyle of the region | 7%  |
| To escape from everyday life                                  | 6%  |
| To entertain visitors                                         | 3%  |
| To discover something new or different                        | 3%  |
| A stop/diversion as part of a longer trip                     | 3%  |
| Other/Don't know                                              | 2%  |

◆ Visitors were asked *whether advice was sought in planning this trip*.

Just under two-thirds of visitors sought some kind of advice when planning the trip. This was higher:

- for those who lived further away from the wine areas (overseas visitors)
- for women, and
- for those visiting the Hunter Valley rather than Mudgee.

**Advice Sought In Planning Trip—Chart 9**



◆ Winery visitors were asked *what advice sources were used*.

The four main areas of advice were:

- internet
- friends and relatives
- Visitor Information Centre, and
- travel guide/book.

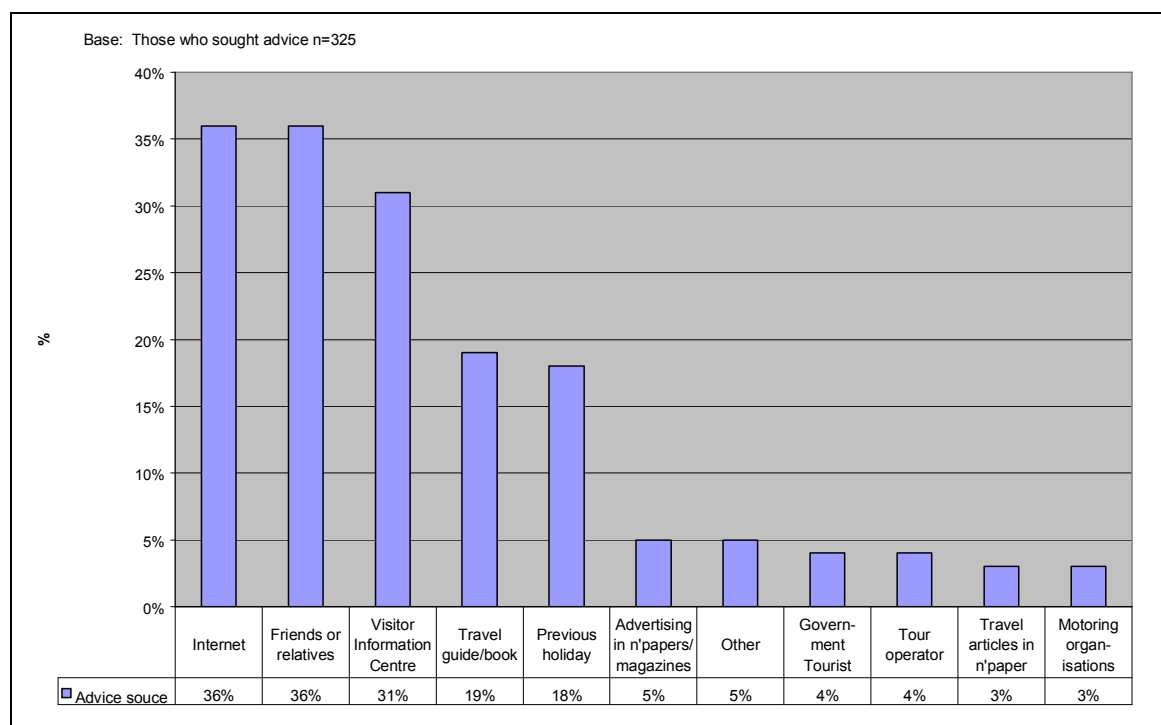
The role of the Visitor Information Centre shows the importance of local tourism organisation promotion.

These findings were compared to the results for the 2002 National Visitors Survey produced by the Bureau of Tourism Research. This survey showed that holiday/leisure visitors had:

- a similar result for tourism offices (19%)
- a much greater role for the internet (63%), and
- a role for travel agents (16%).

In the current cellar door survey, the internet played a much smaller role, while travel agents played no appreciable role at all.

**Advice Source In Planning Trip—Chart 10**

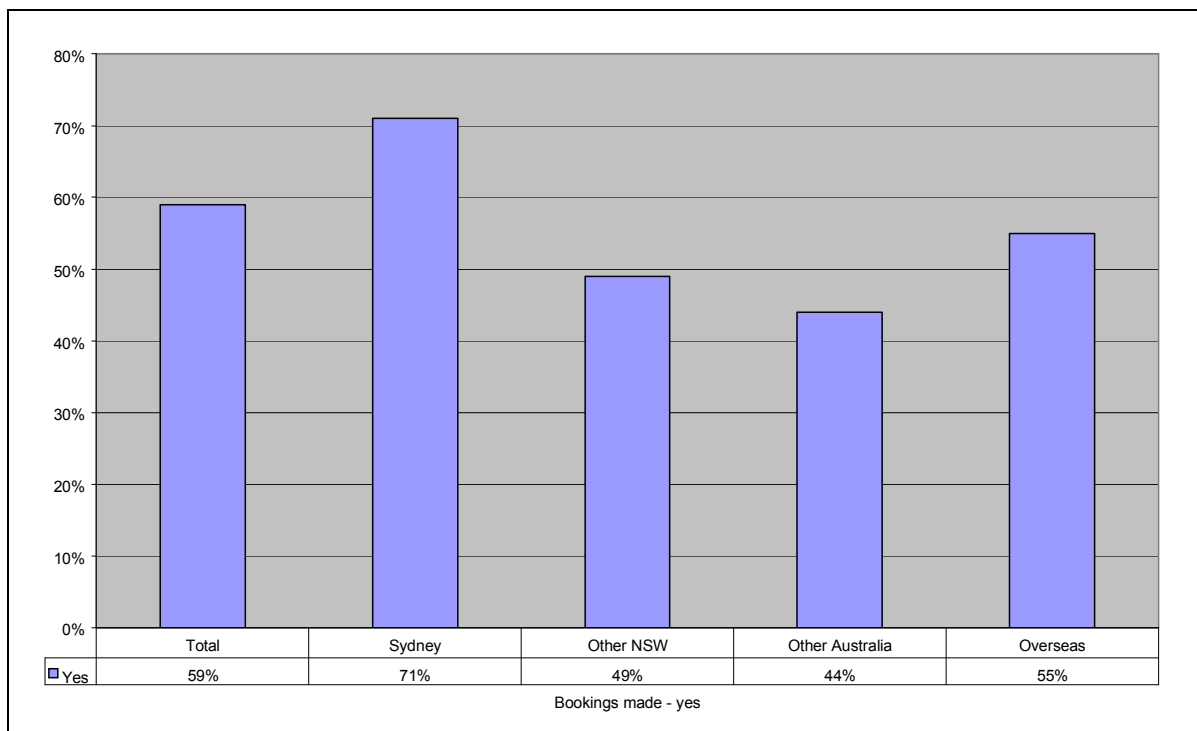


◆ Visitors were asked if **a booking was made for this trip**.

- Bookings were made in 59% of cases.
- This increased to 71% for visitors from Sydney.

Sydney residents made more bookings than those from 'other NSW', 'other Australia' and overseas.

**Was A Booking Made For This Trip—Chart 11**



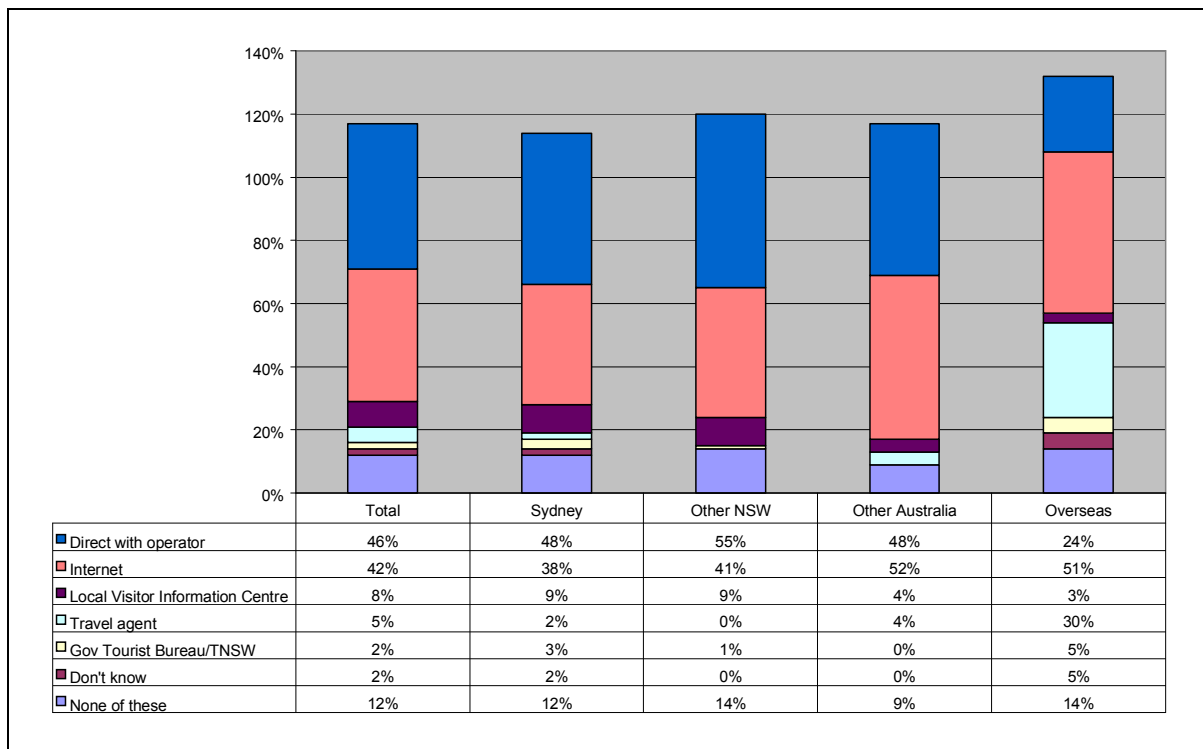
◆ Where a booking had been made for the trip, cellar door visitors were asked **how was the booking made for this trip**.

The totals shown below are greater than 100% due to some trip elements being booked by different methods.

Booking either directly with the operator or through the internet accounted for 88% of bookings.

This was fairly consistent across analysed groups, with the exception of those from overseas where booking direct with the operator was much lower, and the use of a travel agent was much higher.

**How Was Booking Made For This Trip—Chart 12**

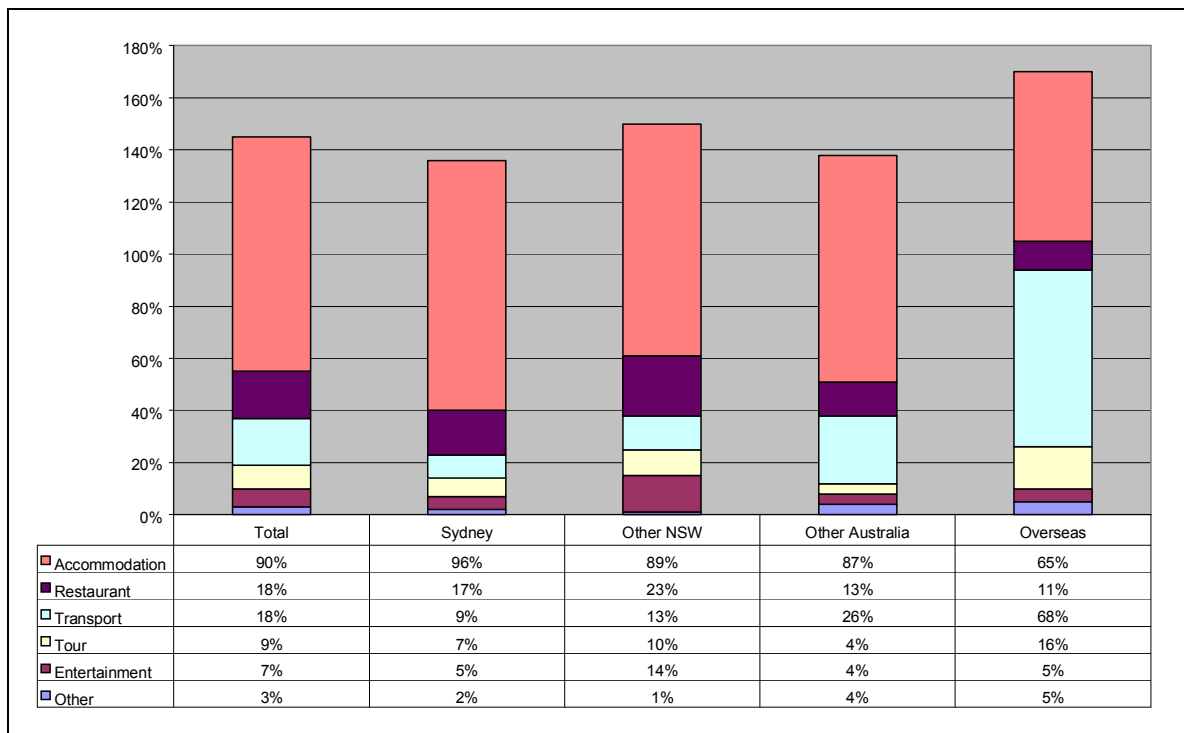


◆ Visitors who made advance bookings were asked **which areas advance bookings were made for**.

The totals add up to more than 100% due to multiple areas being booked in advance.

- Accommodation accounted for the majority of advance bookings, followed by restaurant and transport.
- Accommodation advance bookings was slightly stronger for residents of Sydney than for other areas.
- Overseas visitors had high levels of pre-bookings for transport—which is perhaps not surprising as wine areas require mobility.

**What Were Advance Bookings For—Chart 13**



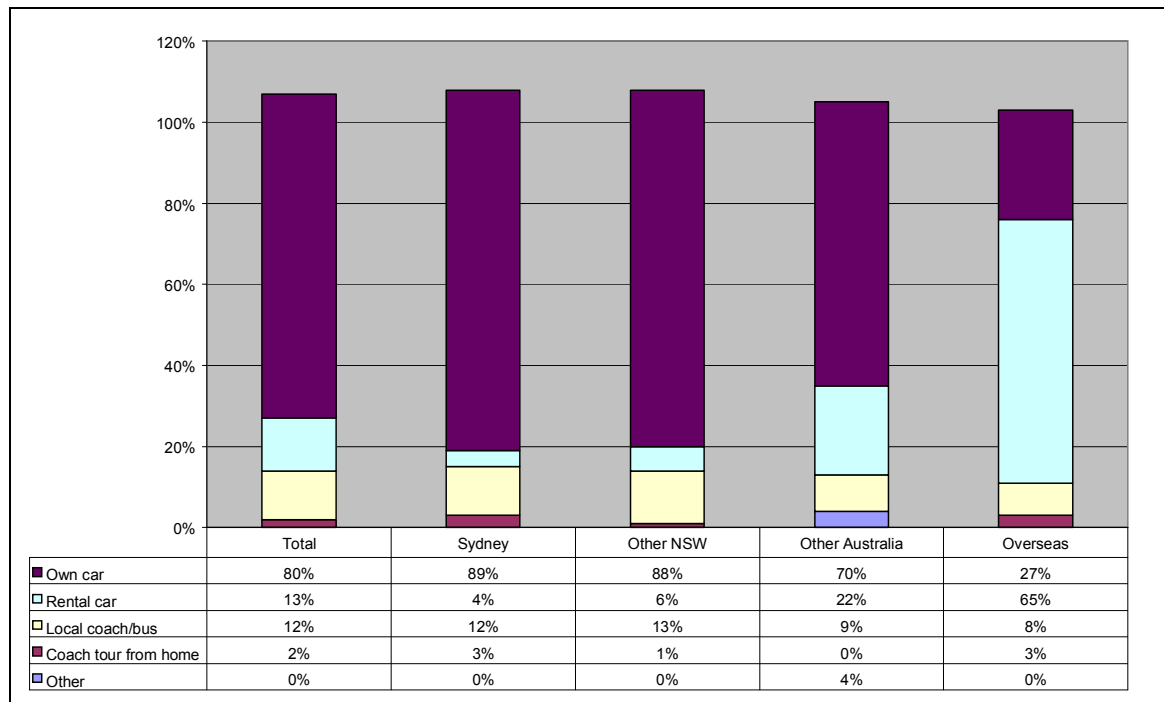
◆ Cellar door visitors were asked *what transport was used on this trip*.

As with previous findings, multiple forms of transport being used means that totals add up to more than 100%.

With the exception of those who lived overseas, most visitors used their own cars.

Given that alcohol consumption is part of the cellar door visit, it was somewhat surprising to see that only 12% of visitors used a local coach or bus. This is possibly an area that could be expanded given the current social trend to reduce drinking when driving.

**Transport Used In Visit To Wineries—Chart 14**



◆ Visitors were asked what was their **accommodation preference when staying in wine areas**. The options given were from a closed-ended list of accommodation types.

The two main forms of accommodation preference were ‘bed and breakfast/guest house’ and ‘self-contained cabins/cottage/house’. Together these types add up to 42% of preferences.

There were significant differences between visitors to both areas. Visitors to Mudgee were far more interested in staying in ‘mid-cost (family) accommodation’ (17%) than those who visited the Hunter Valley (9%). Mudgee also had stronger preferences in the areas of:

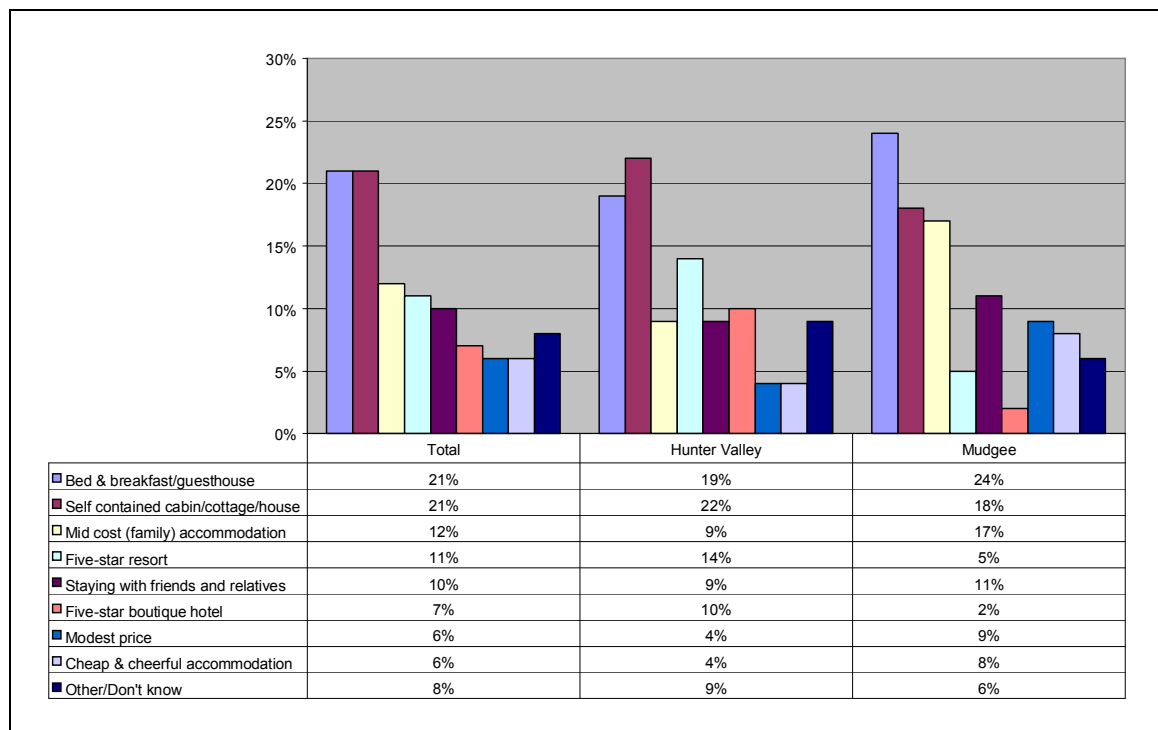
- cheap and cheerful accommodation, and
- modest price.

The Hunter Valley visitors had a preference for accommodation styles of:

- a five star resort, and
- a five star boutique hotel.

Overall, there is a clear preference for luxury style accommodation in the Hunter Valley, while visitors to Mudgee are more inclined to favour a lower cost experience.

**Accommodation Preference When Visiting Wine Areas—Chart 15**



### 4.3 The Role Of Wine

◆ Visitors to wine areas were asked a number of questions to explore ***the understanding of wine and the role that wine plays in their travel behaviour***.

As part of this, visitors were asked to rate their knowledge of wine on a 0–10 scale where zero equalled ‘no knowledge at all’ and ten equalled ‘expert knowledge’.

Overall, visitors rated themselves at 5.06 on this scale with men rating their knowledge of wine slightly higher than women (6.05 v 5.65).

Only 7% of visitors rated their knowledge at either 9 or 10.

In self-assessment, research participants could be reasonably expected to rate their knowledge at the highest level they felt was justifiable rather than the lowest level justifiable. With this in mind, it is surprising to see that visitors assessed their knowledge as essentially ‘average’—clearly few visitors to wine regions consider themselves experts.

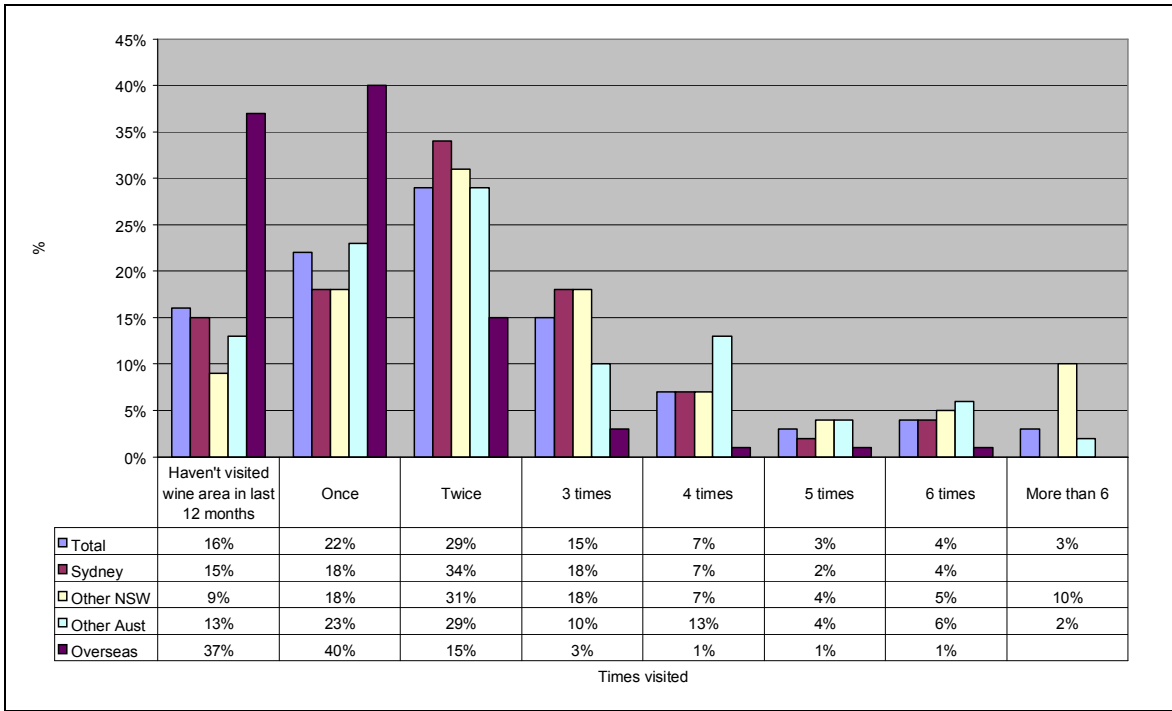
Despite this, when asked ***how many times have you visited Australian wine areas in the last 12 months***, 83% of respondents had made other visits to wine areas in addition to this visit. The ‘frequency mode’ was two additional visits to wine areas in the past 12 months (29% of respondents).

Visits from Australian residents appear to be part of a regular pattern of winery visitation. This has some implications for the management of cellar doors. While visitors do not necessarily consider themselves wine experts, they are certainly knowledgeable about wine growing areas and cellar door opportunities. The level of repeat visitation gives individual cellar doors a chance to develop a relationship with individual customers.

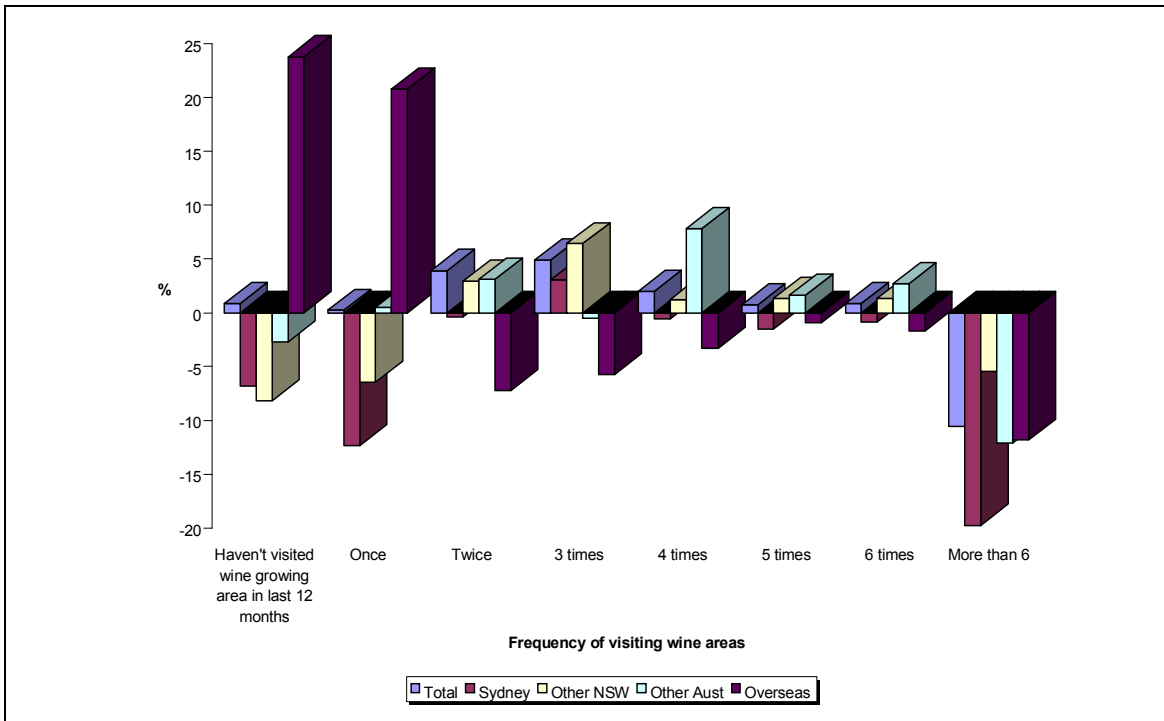
61% of overseas visitors had visited other wine areas in Australia in the last 12 months. While this is lower than the Australian findings, it is still a high level of winery visitation, suggesting that overseas visitors, like their Australian counterparts, are interested in visiting wine areas during their stay in this country.

(See Charts 16 and 17 overleaf.)

**How Many Times Visited Australian Wine Areas—Chart 16**



**Times Visited—Deviations From Expected Values—Chart 17**



◆ Where research participants had visited Australian wine areas, they were asked ***which wine areas had been visited in the last 12 months.***

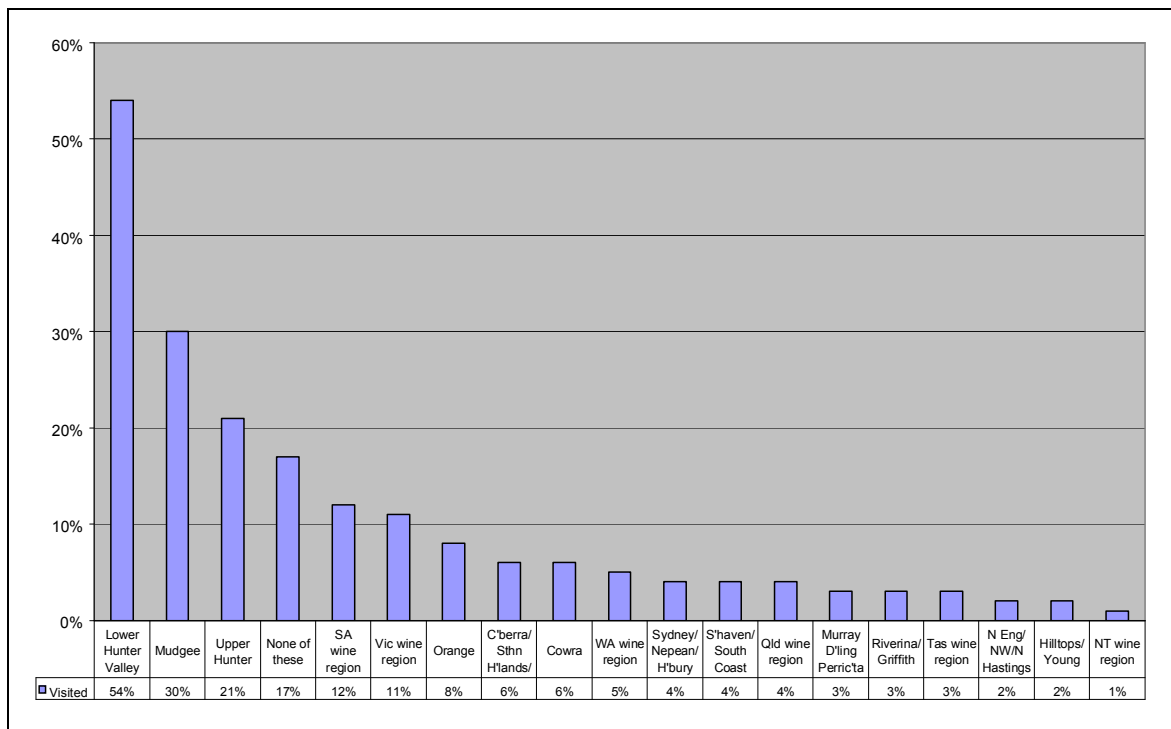
As with other figures, more than one wine area may be visited in the past 12 months, allowing the figures to add up to more than 100%.

The Hunter and Mudgee areas accounted for 105% of visits. This was followed by South Australian wineries (12%) and Victorian wineries (11%).

For 'other wine areas in NSW', Orange, Canberra/Southern Highlands, Cowra, Sydney/Nepean Hawkesbury, Shoalhaven/South Coast and Riverina/Griffith were the most visited.

Cellar doors in the Hunter Valley and Mudgee areas are primarily visited by NSW residents.

**Wine Areas Visited In The Last 12 Months—Chart 18**



◆ Many cellar door operators have established wine clubs as a way of enhancing profitability through disintermediation of the wine retail chain and increasing loyalty to individual wineries. With this in mind, visitors were asked a number of questions about **wine club membership**.

- Overall, 29% of visitors were members of a wine club.
- This was slightly higher:
  - for men (32%)
  - 44–55 year olds (39%), and
  - households where income was over \$100,000 per annum (39%).

◆ Where visitors were members of wine clubs, they were asked to **name the wine club**. Table 3 below shows some of the wine clubs visitors were members of. Due to the numerous wine clubs named, not all were recorded at the coding stage.

No individual wine club was significant in its own right, with the market being characterised by a fragmented and disparate collection of winery operators. It appears that ‘almost anybody can run a wine club’ with a wide range of operators and business types.

**Wine Club Membership—Table 3**

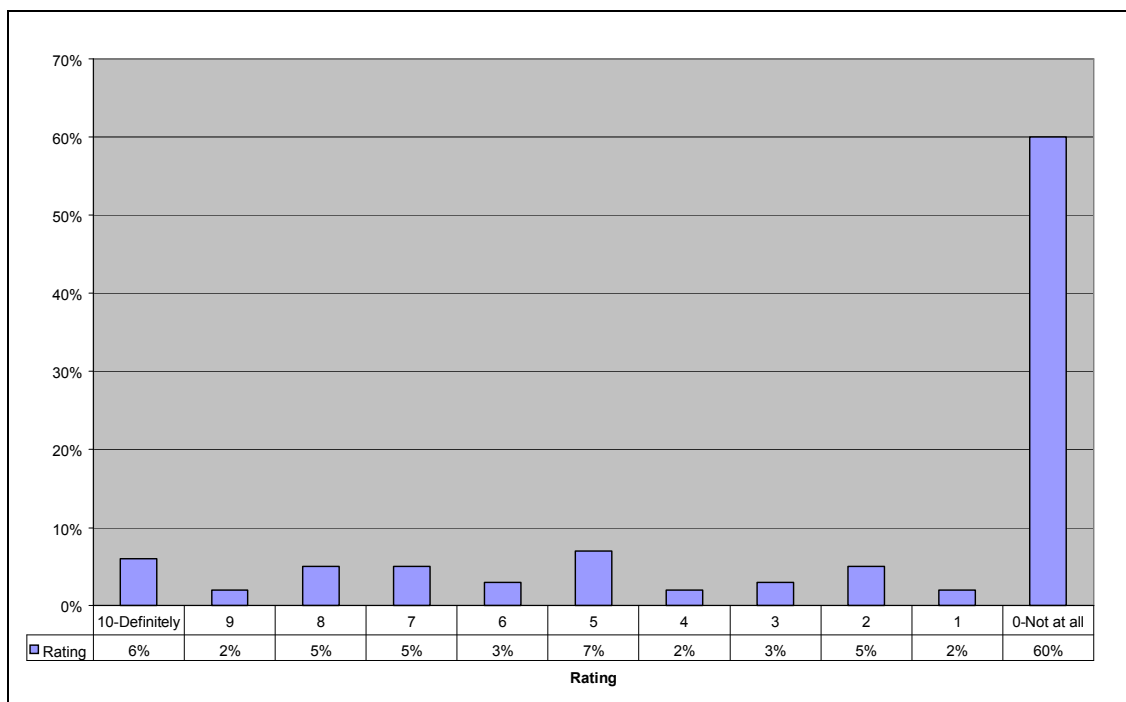
|                                  |                                |                                   |
|----------------------------------|--------------------------------|-----------------------------------|
| ACT Wine Club                    | : Drayton's Family Wines       | : Qantas Club                     |
| All Saints—Victoria              | : Epicurian—Brown Bros         | : Rosemount Estate                |
| ANZ Wine Club                    | : Eyton                        | : Rothbury                        |
| Australian Wine Club             | : Farmer Bros                  | : Rutherglen                      |
| Australian Wine Society          | : Farmers Daughters—Mudgee NSW | : Sobels                          |
| Bethany Estate—Barossa Valley SA | : Forbes Claret Club           | : Stanton & Killeen               |
| Bimbadgen                        | : Golden Grape Estate          | : Sunday Times Wine Club          |
| Blue Noses—Blue Mountains NSW    | : Gooseberry Hill Wine Club    | : Tahbilk                         |
| Botobalar—Mudgee NSW             | : Hugh Hamilton                | : Tamburlaine                     |
| Boutique Wine Club               | : Hungerford Hill              | : Tempest II/Tempest Two          |
| Bremeton                         | : Hunter Valley Wine Society   | : Tower Estate/Tower 200          |
| Briar Ridge                      | : Ivanhoe                      | : Tyrrell's/Tyrrell's Private Bin |
| Brokenwood                       | : Kemeny's                     | : Vinden Estate                   |
| Calais Estate                    | : Margaret River Wine Club     | : Vintage Cellars                 |
| Cape Mantel (WA)                 | : McLeish Estate               | : Virgin Wines                    |
| Cellar Door Direct               | : Milawa—Brown Bros            | : Wandin Valley Cork Club         |
| Cellarmasters                    | : Mount View                   | : Wine Selectors                  |
| Chapmanor Cellars                | : National Visa Card           | : Wine Society (NSW)              |
| Crown of the Hill                | : Oakvale                      | : Xanadu—Margaret River WA        |
| Cruickshanks                     | : Penfold's—Hunter Valley NSW  | : Don't know                      |
| D'Arenberg                       | : Pepper Tree                  | : Other                           |
| Diners Club                      | : Peterson's House             |                                   |
| Draytons                         | : Pigge's Peak                 |                                   |

◆ Visitors were asked their **level of interest in joining a cellar door wine club**. This was rated on a 0–10 scale where zero equalled ‘not at all’ and ten equalled ‘definitely’.

- 60% of visitors had no interest at all in joining a cellar door wine club.
- Of those who had no interest in joining a wine club, only 17% are currently members of another wine club.
- This leaves 40% of visitors with varying levels of interest in joining a cellar door wine club, though with 29% of visitors already being members of wine clubs, the additional utility of an individual cellar door wine club is questionable.

The fragmented market and lack of interest in joining a wine club demonstrates why many cellar door operators have had little success in this area.

**Interest In Joining A Cellar Door Wine Club—Chart 19**



#### 4.4 The Cellar Door Experience

Cellar doors offer a wide range of experiences and activities for visitors. Some questions were asked to further develop the understanding of participation in these activities.

◆ Visitors were asked whether they *spent time with the wine maker*.

The findings are:

- total—22% yes
- Hunter—19% yes
- Mudgee—28% yes.

Overall one in five visitors spends time with the wine maker—though this is significantly more likely to happen in the Mudgee wine area, possibly a function of the smaller size of wineries in this region.

◆ Visitors were asked *whether locally made arts and crafts were on sale at the cellar door*.

The findings are:

- total—67% yes
- Hunter—60% yes
- Mudgee—80% yes.

With over two-thirds of wineries selling locally made arts and crafts, this is obviously a widespread and popular activity. It is interesting that once again Mudgee seems to be offering slightly more in this area than Hunter Valley wineries.

◆ Visitors were asked *whether entertainment was provided*.

The findings are:

- total—15% yes
- Hunter—9% yes
- Mudgee—24% yes.

Provision of entertainment is a widespread activity. This may be somewhat understated in that entertainment is not provided continuously throughout the day. Where entertainment is provided at the cellar door, not all visitors will experience it. As in the previous two measures, Mudgee is more active in this area.

◆ Visitors were asked whether they have ***ever purchased from a retail outlet, wine they first tried at a cellar door.***

The findings are:

- total—67% yes
- Hunter—66% yes
- Mudgee—69% yes.

This is a highly satisfactory result showing that visiting cellar doors results in subsequent retail sales. This is possibly far more successful than one might expect. It certainly shows that promoting retail sales as a result of the cellar door experience appears to have more 'traction' than attempting to create a cellar door specific wine club.

Unlike the previous measures in this section, there was little difference between Mudgee and Hunter Valley wineries.

◆ Visitors were asked ***the number of cellar doors visited during this trip.*** It should be noted that the trip may be more than one day.

The table below shows the comparative number of trips between groups. Overall 6.62 wineries were visited each trip.

**Number Of Cellar Doors Visited On This Trip—Table 4**

| Area            | Average cellar doors visited |
|-----------------|------------------------------|
| Total           | 6.62                         |
| Hunter          | 6.63                         |
| Mudgee          | 6.59                         |
| Sydney          | 7.11                         |
| Other NSW       | 6.13                         |
| Other Australia | 7.12                         |
| Overseas        | 5.52                         |

◆ Visitors were asked **how many nights they were staying in wine areas as part of this trip**:

- The average number was 2.15 nights away from home (this included zero nights away from home).
- The length of stay was slightly longer for Mudgee than for the Hunter Valley.
- Visitors from areas of Australia other than NSW were the longest stayers, staying an average of 4.04 nights.

**Average Number Of Nights Stayed This Trip—Table 5**

| Area            | Average nights stayed |
|-----------------|-----------------------|
| Total           | 2.15                  |
| Hunter          | 1.86                  |
| Mudgee          | 2.61                  |
| Sydney          | 2.06                  |
| Other NSW       | 1.83                  |
| Other Australia | 4.04                  |
| Overseas        | 1.9                   |

From the findings above we can calculate the **average number of wineries visited per trip**.

On average, 3.07 wineries were visited per day.

Most visits to cellar doors were stays of one or more nights. Only about one-fifth of visits were part of a day trip. The *mode* of visits was staying for two nights, while 25% of visitors stayed for three or more nights.

**Length Of Stay For This Trip—Table 5A**

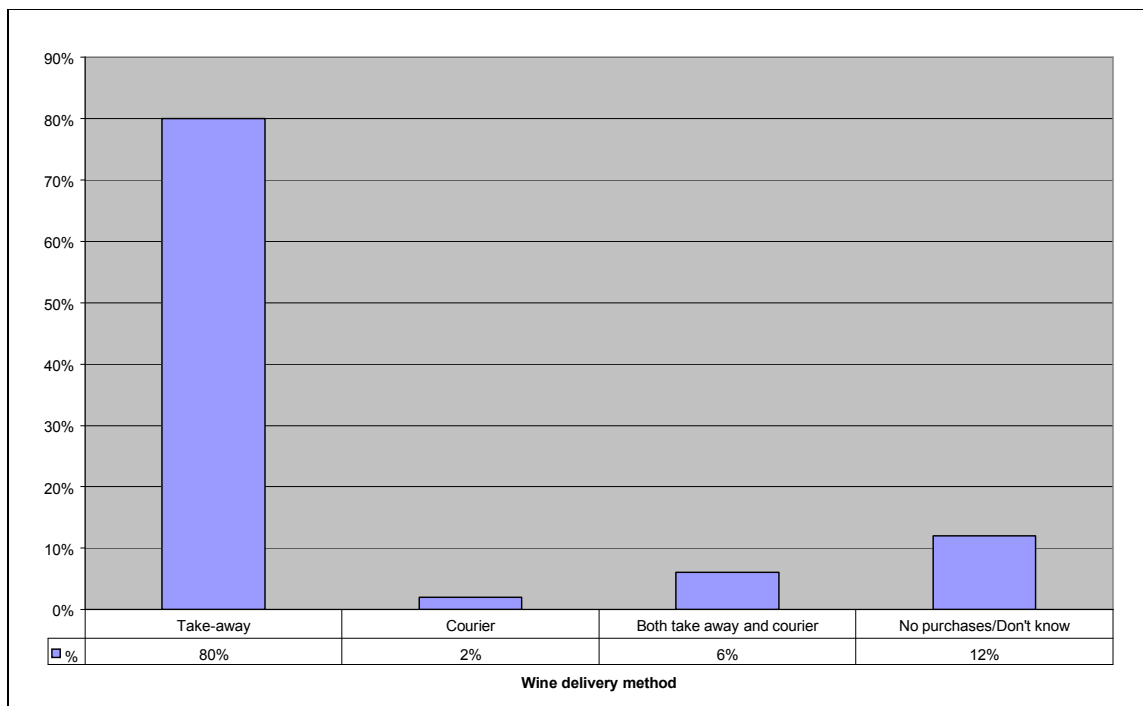
|                    | Total | Hunter Valley | Mudgee | Sydney | Elsewhere in NSW | Elsewhere in Australia | Overseas |
|--------------------|-------|---------------|--------|--------|------------------|------------------------|----------|
| Day trip           | 20%   | 25%           | 11%    | 10%    | 33%              | 8%                     | 31%      |
| 1 night            | 16%   | 16%           | 16%    | 16%    | 16%              | 13%                    | 18%      |
| 2 nights           | 37%   | 39%           | 35%    | 48%    | 25%              | 21%                    | 40%      |
| 3 nights           | 14%   | 11%           | 19%    | 17%    | 12%              | 17%                    | 3%       |
| More than 3 nights | 11%   | 9%            | 17%    | 8%     | 15%              | 42%                    | 6%       |

◆ Visitors were asked **how wine purchases were delivered**. This also included a measure of those who did not make purchases.

The findings from this question showed that 88% of visitors to wine areas make purchases as part of the trip. This shows that the increasing number of visitors will also increase the level of turnover for wineries.

Where visitors made purchases, 80% of them were 'take-away'. Courier delivery only played a limited role in wine purchases.

**Wine Delivery Method—Chart 20**



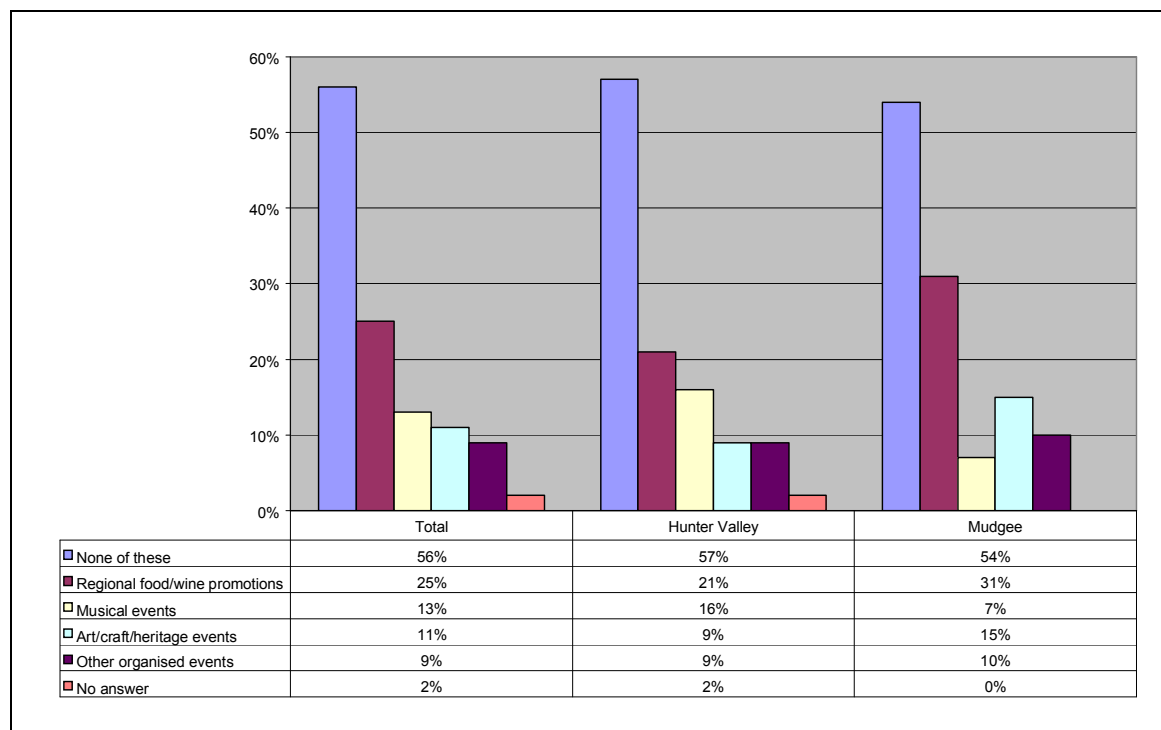
◆ Visitors were asked from a closed-ended list of options *what events they had visited as part of this trip*.

Around a quarter of those who visited the Hunter and Mudgee wine areas also attended a regional food/wine promotion. Other popular events were musical events and arts and crafts events.

There were significant differences between the Hunter and Mudgee:

- the Mudgee area was much stronger in attendance of ‘regional food’ promotions
- the Hunter Valley was much stronger in attendance at ‘musical events’.

**Events Visited On This Trip—Chart 21**

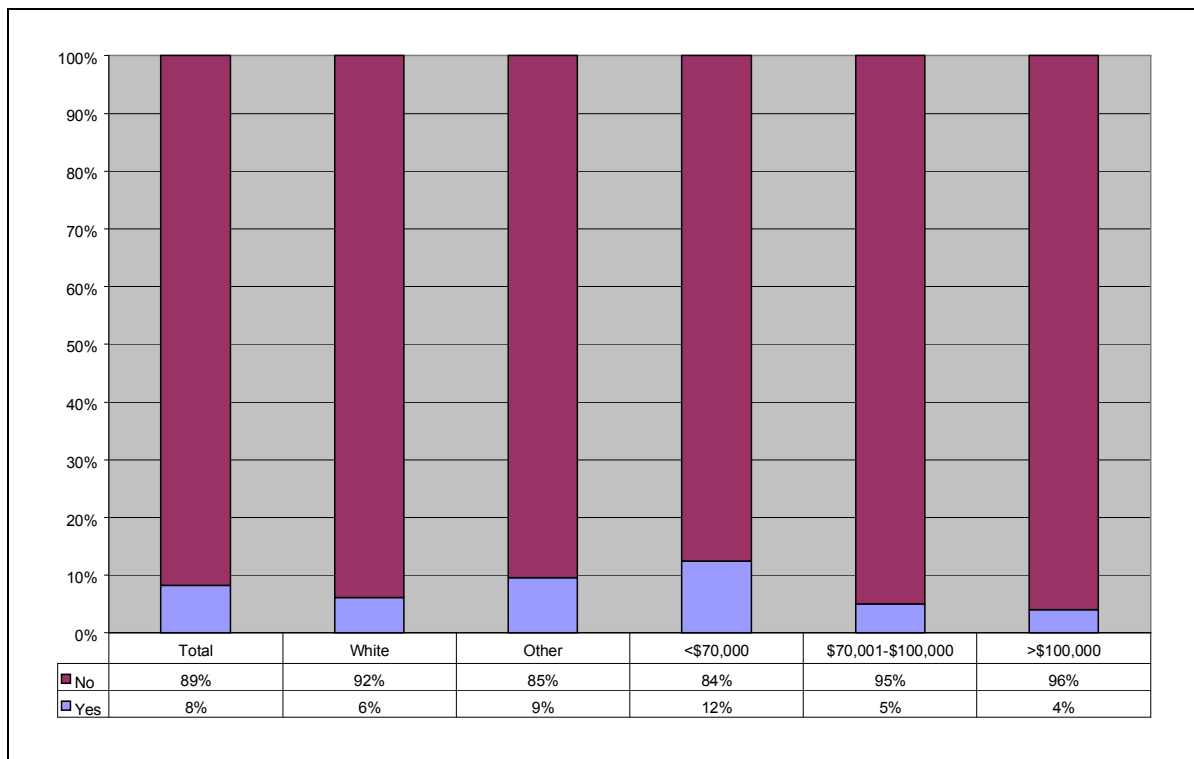


◆ Visitors were asked whether they were *part of an organised tour*.

In total, around 8% of visitors were part of an organised tour.

Participation in an organised tour was less likely the greater the level of household income.

**Part Of An Organised Tour—Chart 22**



◆ Visitors were asked to **rate a number of statements about their visit to the winery** on a 0–10 scale where zero was ‘completely disagree’ and ten was ‘completely agree’.

The statements are shown below.

### Statements About Winery—Table 6

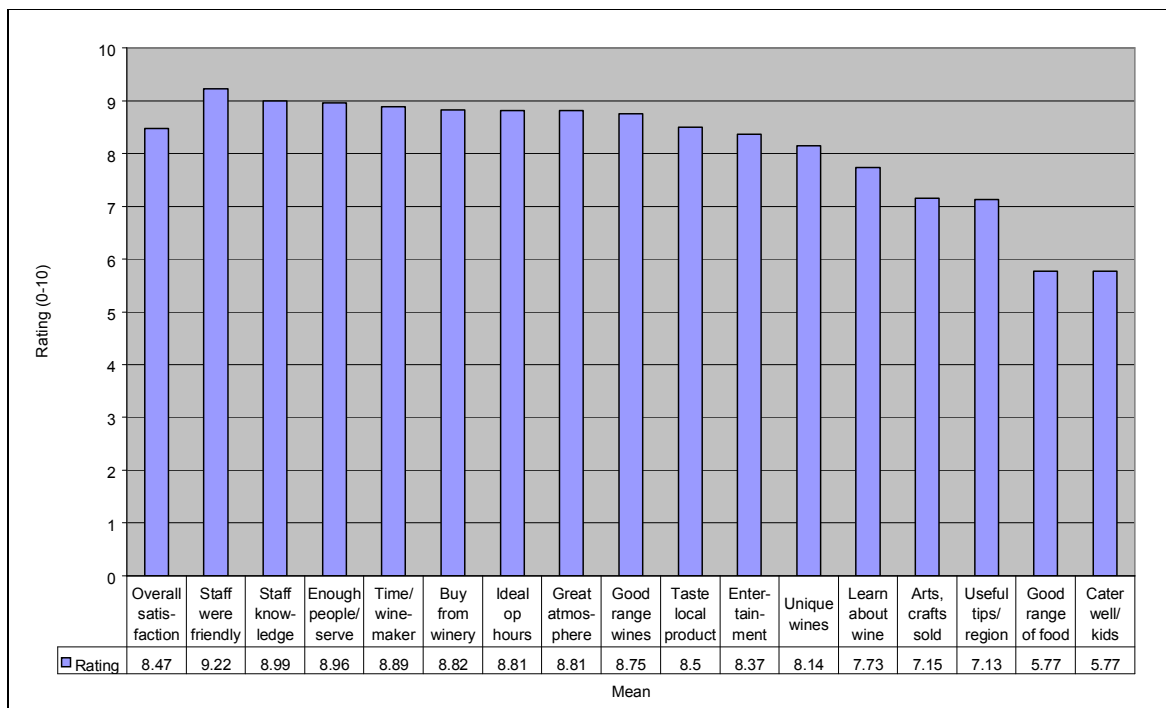
|                                                                                         |
|-----------------------------------------------------------------------------------------|
| The staff were friendly                                                                 |
| There was a good range of wines for tasting and buying                                  |
| I tasted/purchased wines not readily available elsewhere                                |
| The staff were knowledgeable about wine                                                 |
| There were enough people to serve                                                       |
| There was a good range of food available                                                |
| They catered well for children                                                          |
| The operating hours [of cellar door] are ideal                                          |
| The cellar door has great atmosphere                                                    |
| I learned something about wine today                                                    |
| I would consider purchasing wines made by this winery in the future                     |
| I had the chance to taste/buy some locally made produce                                 |
| I was able to pick up some useful tips from the staff about things to do in this region |
| Experience of spending time with the winemaker (where time spent)                       |
| Range of arts, crafts and souvenirs (where sold)                                        |
| Entertainment provided (where provided)                                                 |
| Rating of overall experience of visiting this cellar door                               |

◆ Almost all elements received positive ratings. The only areas in which ratings could be considered in any way poor were:

- I learned something about wine today
- Range of arts, crafts and souvenirs (where sold)
- I was able to pick up some useful tips from the staff about things to do in this region
- There was a good range of food available
- They catered well for children.

The lack of differentiation between the variables measured shows the limitations for cross tabulation analysis. These are more fully examined in section 4.5, A Model Of Satisfaction.

**Winery Ratings—Chart 23**



◆ Visitors were asked to rate a number of **statements about the region**. These were on the same scale as for the winery.

**Statements About The Region—Table 7**

|                                             |
|---------------------------------------------|
| Availability of food to buy or taste        |
| Unspoiled (not too touristy)                |
| Natural surroundings                        |
| Access to nearby national parks             |
| Friendly locals                             |
| Local history and heritage                  |
| Art galleries and museums                   |
| Shopping in the local area                  |
| Range of local events and festivals         |
| Range of cafes and restaurants              |
| Range of accommodation available            |
| Quality of tourist information available    |
| Quality of roads in the area                |
| Quality of signage for wineries on the road |

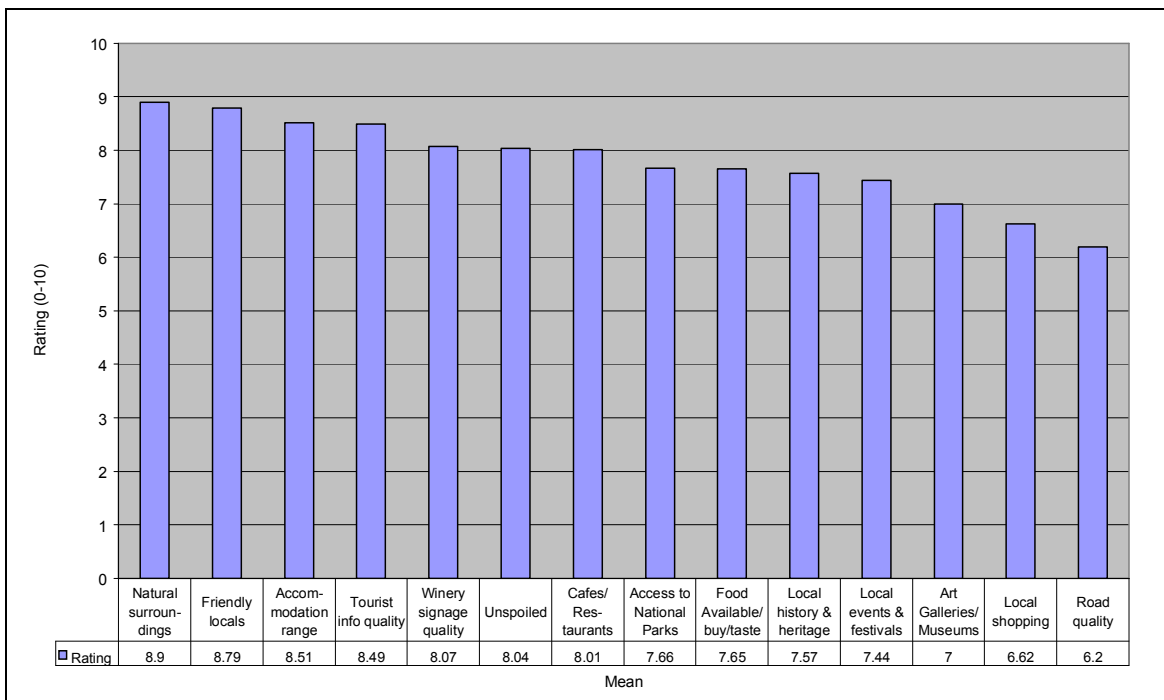
◆ As with the statements about the winery, most ratings are very positive.

Visitors to wine areas gave the region slightly lower ratings than individual wineries. However, very few ratings could be considered poor. The lowest ratings were for:

- art galleries and museums
- shopping in the local area
- quality of roads in the area.

As with the previous measure, these ratings are more fully explored in section 4.5.

**Wine Area Ratings—Chart 24**



## 4.5 A Model Of Satisfaction

As discussed in the previous section, the ratings for satisfaction of winery and area elements are in themselves difficult to interpret at a cross-tabulation level. Almost all aspects are highly satisfactory. To further understand the importance of these elements in cellar door satisfaction, further statistical analysis was required.

Multiple linear regression was used to determine which elements had an impact on satisfaction and the relative importance of each of these elements. The *dependant variable* (DV) was the rating of satisfaction for the visit.

Five different models of behaviour were developed using different forms of regression. After analysis, it was determined to use the elements generated by all five models. The figures below are an average of the *standardised beta coefficient* for all five models.

Of the 16 questions asked about the winery, and the 14 questions asked about the region, only seven areas were important in generating satisfaction. Full details of the regression calculations are included in this report as Appendix 3.

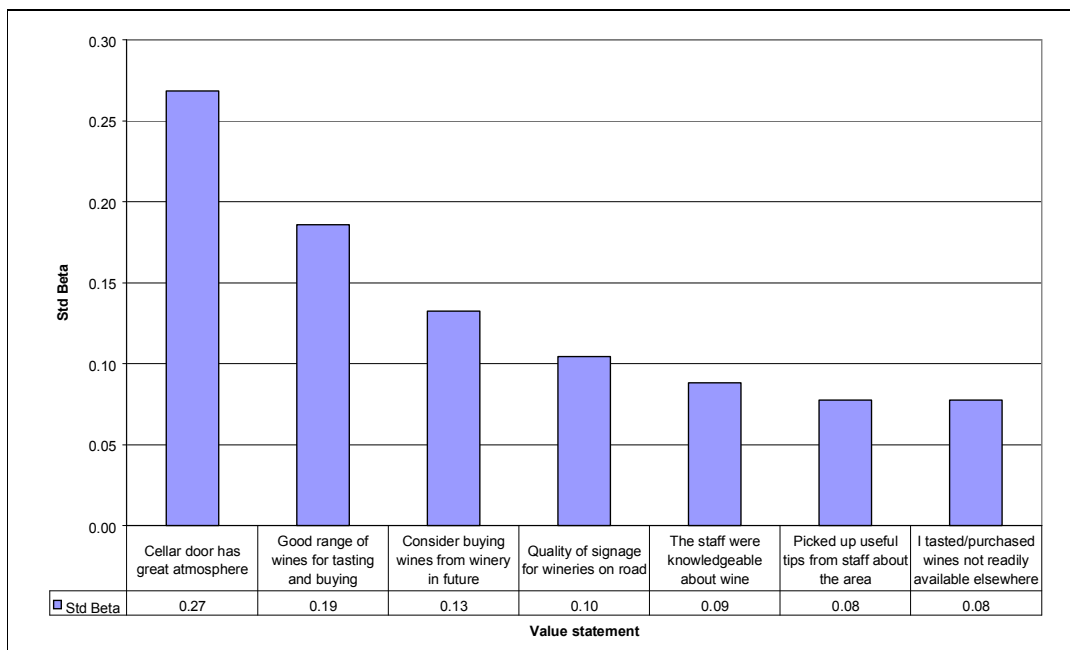
From this analysis the raking of importance is:

| Area   | Value statement                                          | Std Beta |
|--------|----------------------------------------------------------|----------|
| Winery | Cellar door has great atmosphere                         | 0.27     |
| Winery | Good range of wines for tasting and buying               | 0.19     |
| Winery | Consider buying wines from winery in future              | 0.13     |
| Region | Quality of signage for wineries on road                  | 0.10     |
| Winery | The staff were knowledgeable about wine                  | 0.09     |
| Winery | Picked up useful tips from staff about the area          | 0.08     |
| Winery | I tasted/purchased wines not readily available elsewhere | 0.08     |

- The most important aspect of visiting a cellar door was that ‘the cellar door has great atmosphere’—this aspect was almost a third more important than the next value.
- The next most important areas relate to the quality and range of stock from the cellar door. Having a range, both for tasting and buying is important—though visitors also have to enjoy the wine!
- The desire to purchase wines from the cellar door in the future has an impact on satisfaction.
- The quality of signs on the road is the only regional aspect that has an impact of satisfaction. The *dependant variable* for this project was satisfaction with the cellar door—the result may have been different if the DV was satisfaction for the whole visit to the region.

- While the first four identified elements of importance are related to the physical environment, the next two elements *related* specifically to staff. A satisfied visitor has received suggestions on ‘things to do’ in the area from staff, and been served by a staff member who is ‘knowledgeable about wine’.
- The final area of importance is the purchase of wines that are not easy to purchase elsewhere. Tasting or buying wines not available elsewhere is likely to promote a feeling of discovery which translates into a satisfied visitor.

**Importance Model—Chart 25**



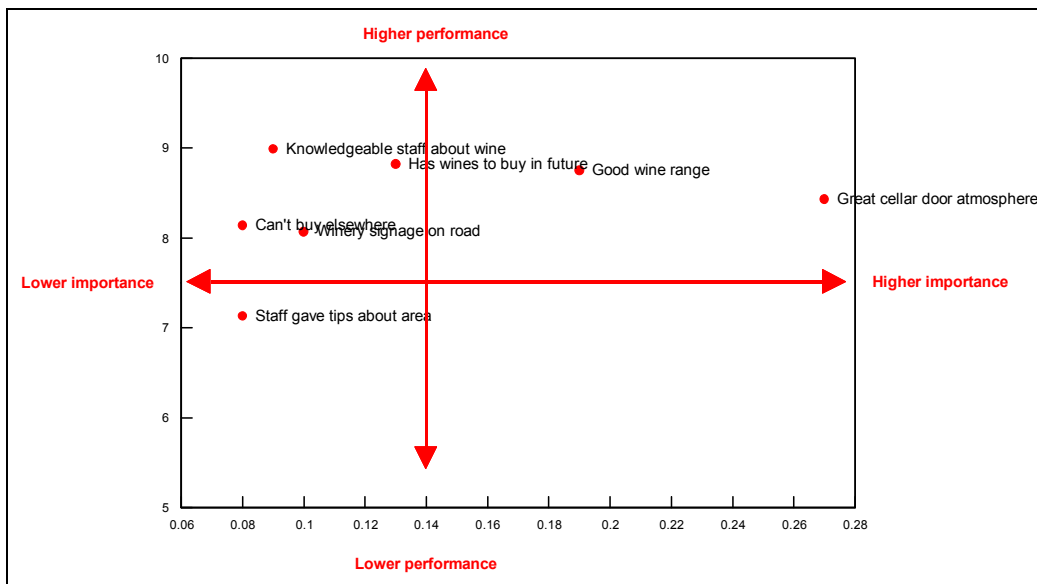
◆ By placing these elements of importance and the elements of performance on a quadrant, we can see which elements can be leveraged for greatest effect. In this analysis the quadrant lines represent the *mean* or average point for the standardised beta score for importance and the satisfaction scores.

In the diagram below none of the elements is unimportant, the quadrant shows the relationship between the level of importance and the level of current performance at cellar doors.

- First and foremost the ‘atmosphere’ of the cellar door is the most important aspect of the experience. While wineries perform well on these terms (8.43), gains on this front will make the largest impact upon the quality of the cellar door experience for consumers. Improvements in the atmosphere will have a greater impact of satisfaction than other areas of ‘importance’.

- Staff play an important role in the cellar door experience. Satisfaction comes from staff being knowledgeable about wine, but extra benefit is gained where staff can also give tips about things to do in the area. This additional information represents an area where individual cellar doors can add value to the visitor experience above what is expected.
- There are three aspects of the wine sold by cellar doors:
  - the most important is that there is a good range of wine to purchase
  - this is followed by the cellar door having a range of wines to purchase in the future
  - finally there should be an element of exclusivity to the visit in that the wine cannot be purchased elsewhere.
- Clear road signage on the road is the final area that is easy to improve and will generate increased satisfaction.

**Importance by Performance—Chart 26**



## 4.6 Expenditure

Expenditure information was collected for:

- purchases at 'this' cellar door
- purchases for all cellar doors
- accommodation, and
- food.

To determine the level of expenditure, the following process was undertaken:

- respondents were asked the amount spent on these items for the group they were travelling with and sharing the same expenditures with
- the number of people in the group sharing the same expenditure was recorded
- individual answers were then examined and 'outliers' discarded
- expenditure was divided by people in the groups sharing the same expenditure.

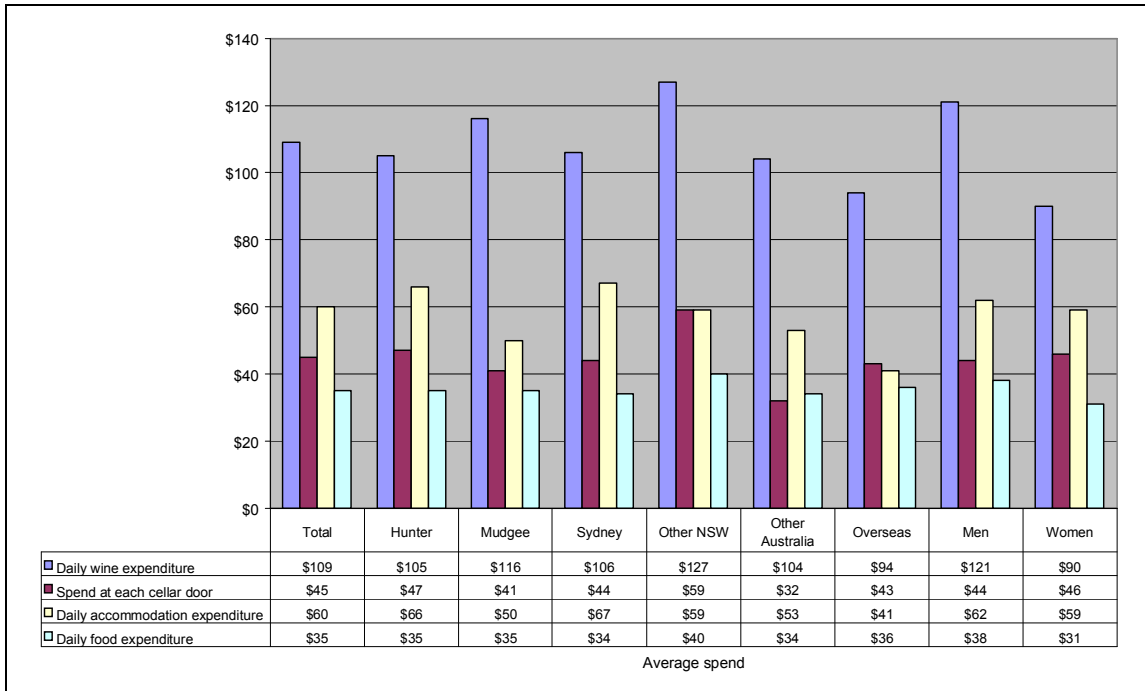
The outcome will produce a 'per person' average expenditure figure.

As with all expenditure data collected by an individual's recollection rather than a diary system, this questioning approach is not entirely accurate. However, it gives a sound indicator of the levels of expenditure for various groups on items.

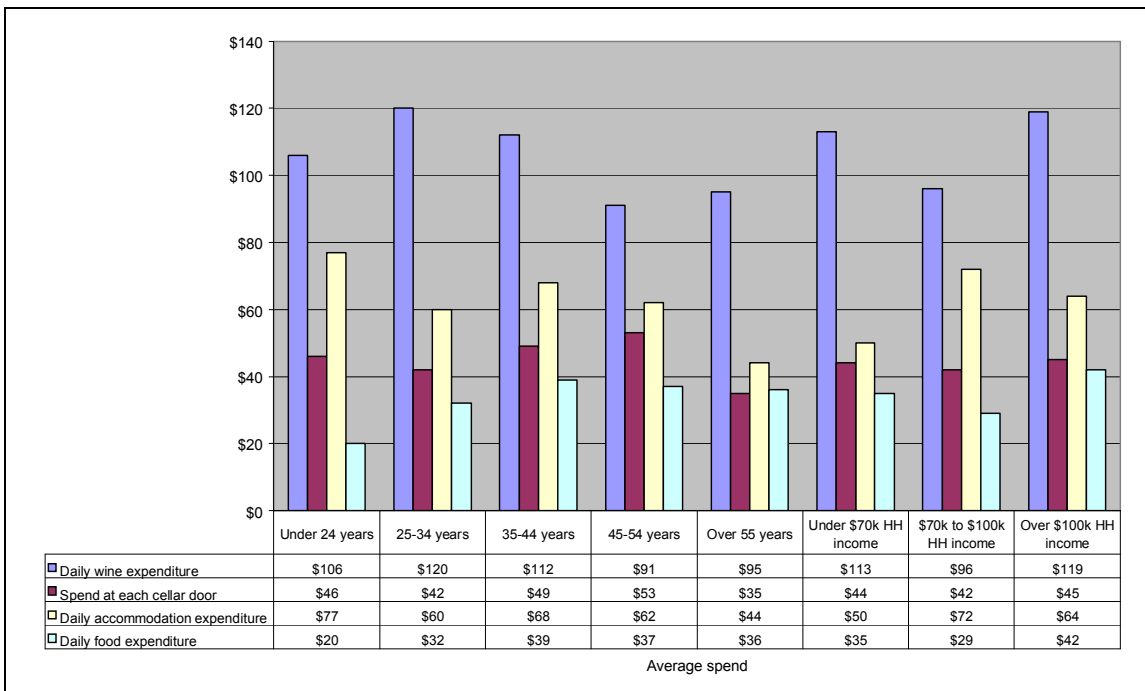
- Wine purchases were the largest expenditure category. Expenditure in this area was just under double that of accommodation, and three times more than the amount spent on food.
- Expenditure on wine was slightly higher for Mudgee, though the Hunter Valley had higher levels of expenditure at individual cellar doors.
- Visitors from Sydney spent the largest amount on accommodation, while overseas visitors spent least.
- Levels of expenditure on wine were higher for those under 44 years of age. The highest level of expenditure was for those 25–34 years. It could be suggested that this group are in the process of building their cellar and thus like to spend more than older age groups.
- Those in the over \$100,000 household income category spent slightly less on accommodation than did those in the \$70,000–\$100,000 household income category. However, the high income group spent more on food than the other two income groups.

(See Charts 27 and 28 overleaf.)

**Expenditure 1—Chart 27**



**Expenditure 2—Chart 28**



***—Appendix 1—  
See Australia Categories***

---

## **APPENDIX 1**

### **—SEE AUSTRALIA CATEGORIES—**

#### **Introduction**

In addition to the main focus of the project, it was important to establish which segments of the See Australia 'value and lifestyle segment' categories were present at cellar doors. It was decided to complete this as part of the validation process rather than the interview. The See Australia categories required 30 questions to be answered—this would have added too much time to the face-to-face interviewing.

#### **Approach**

50 respondents were contacted by telephone and asked whether they would complete a short additional survey. This sample size gives a confidence level of  $\pm 11.75\%$  at the 90% confidence level. While this is a large level of variation, it means that any major trends can be identified.

#### **Segments Present At Cellar Doors**

The chart overleaf shows the levels of the five See Australia categories found at cellar doors and in the general population. While there was no statistically significant difference between the levels of different categories at cellar doors, visitors were more likely to be Pampadours than any other category. This is also the only category to be more highly represented at cellar doors than in the general population.

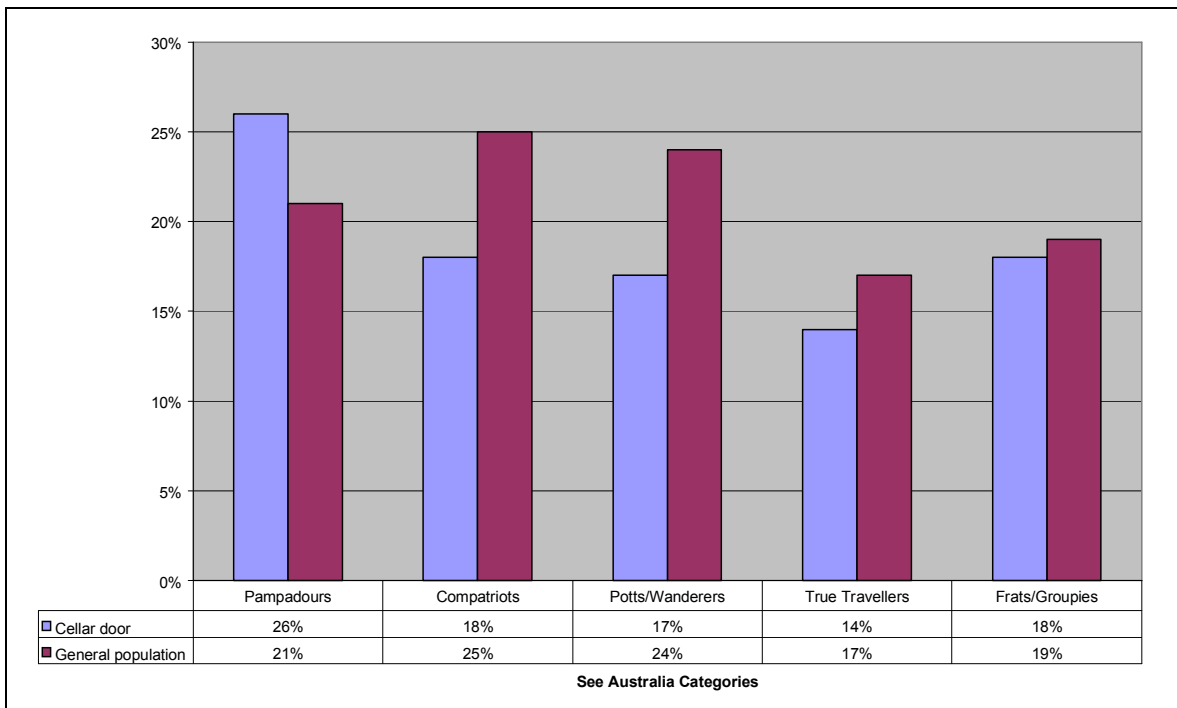
Pampadours represent the indulgence segment which has an expectation of high standards of service and luxury in their holiday choices. They also tend to travel in couples—a characteristic of visiting cellar doors.

Found at levels lower than the general population were Compatriots and Wanderers. Compatriots tend to have lower incomes—which explains their lower incidence. Wanderers tend to be older with an average age of 54–75 years. While the cellar door experience has a wide age appeal, this tends to decline with age.

While the See Australia categories are useful in understanding cellar door visitor types, the strongest indication of propensity to visit wine areas is household income.

(See chart overleaf.)

**See Australia Categories**





***—Appendix 2—  
Questionnaire***

## QUESTIONNAIRE—CELLAR DOOR

**JOB #TN003**

**Q.1** Which of these is your **MAIN** purpose for this trip?

**(PLEASE CIRCLE ONE)**

|                                |          |
|--------------------------------|----------|
| Holiday or leisure             | <u>1</u> |
| Visiting friends and relations | <u>2</u> |
| Business                       | <u>3</u> |
| Wedding                        | <u>4</u> |
| Other                          | <u>5</u> |

**Q.2** How many times in the last 12 months have you made a trip to a wine growing area in Australia?

**(WRITE NUMBER IN THE BOX)**

**Q.3** Which Australian wine regions did you visit in the last 12 months?

**(PLEASE CIRCLE ALL AREAS YOU VISITED)**

|                                          |           |
|------------------------------------------|-----------|
| None of these                            | <u>1</u>  |
| Murray/Darling/Perricoota                | <u>2</u>  |
| Lower Hunter Valley                      | <u>3</u>  |
| Mudgee                                   | <u>4</u>  |
| Sydney/Nepean/Hawkesbury                 | <u>5</u>  |
| Upper Hunter                             | <u>6</u>  |
| Canberra/Sthn Highlands/Snowy            | <u>7</u>  |
| Riverina/Griffith                        | <u>8</u>  |
| Orange                                   | <u>9</u>  |
| New England/North West/Northern Hastings | <u>10</u> |
| Shoalhaven/South Coast                   | <u>11</u> |
| Cowra                                    | <u>12</u> |
| Hilltops/Young                           | <u>13</u> |
| South Australia wine region              | <u>14</u> |
| Victorian wine region                    | <u>15</u> |
| Western Australia wine region            | <u>16</u> |
| Tasmania wine region                     | <u>17</u> |
| Queensland wine region                   | <u>18</u> |
| Northern Territory wine region           | <u>19</u> |

**Q.4** Thinking about this trip, did you get any advice or information from any source to help you plan this trip?

|            |          |
|------------|----------|
| Yes        | <u>1</u> |
| No         | <u>2</u> |
| Don't Know | <u>3</u> |

**Q.5** Where did you get advice or information to help you plan this trip?

**(PLEASE CIRCLE ALL SOURCES)**

|                                           |           |
|-------------------------------------------|-----------|
| Travel Agent                              | <u>1</u>  |
| Internet                                  | <u>2</u>  |
| Government Tourist Bureau                 | <u>3</u>  |
| Visitor Information Centre                | <u>4</u>  |
| Tour operator                             | <u>5</u>  |
| Travel guide/book                         | <u>6</u>  |
| Advertising seen in newspapers, magazines | <u>7</u>  |
| Travel articles seen in newspaper         | <u>8</u>  |
| Friends and relatives                     | <u>9</u>  |
| Motoring organisations                    | <u>10</u> |
| Previous holiday                          | <u>11</u> |
| Other                                     | <u>12</u> |

**Q.6** Did you make any advance bookings for things like travel, accommodation, car rental or entertainment tickets for this trip?

|            |          |
|------------|----------|
| Yes        | <u>1</u> |
| No         | <u>2</u> |
| Don't Know | <u>3</u> |

**GO TO Q.9→**

**GO TO Q.9→**

**Q.7** What part or parts of this trip did you make advance bookings for?

**(PLEASE CIRCLE ALL PARTS)**

|               |          |
|---------------|----------|
| Tour          | <u>1</u> |
| Accommodation | <u>2</u> |
| Transport     | <u>3</u> |
| Entertainment | <u>4</u> |
| Restaurant    | <u>5</u> |
| Other         | <u>6</u> |

**Q.8** Which of the following did you use to make any advance bookings for this trip?

|                                       |          |
|---------------------------------------|----------|
| Internet                              | <u>1</u> |
| Government Tourist Bureau/Tourism NSW | <u>2</u> |
| Local Visitor Information Centre      | <u>3</u> |
| Direct with operator                  | <u>4</u> |
| Travel agent                          | <u>5</u> |
| None of these                         | <u>6</u> |
| Don't know                            | <u>7</u> |

**Q.9** While in this area which of these did you use for transport?

**(ALL TYPES OF TRANSPORT USED)**

|                      |          |
|----------------------|----------|
| Own car              | <u>1</u> |
| Rental car           | <u>2</u> |
| Coach tour from home | <u>3</u> |
| Local coach/bus      | <u>4</u> |

**Q.10** On this trip how many cellar doors are you visiting or intend to visit?

**(WRITE NUMBER IN THE BOX)**

**Q.11** How many nights, if any, are you spending away from home visiting this wine area?

**(WRITE NUMBER IN THE BOX)**

**Q.12** Which of these best describes your primary motivation for this trip? **(CIRCLE ONE ONLY)**

|                                                               |           |
|---------------------------------------------------------------|-----------|
| Leisure/recreation                                            | <u>1</u>  |
| To learn a bit more about wine                                | <u>2</u>  |
| To taste the wines and perhaps buy some                       | <u>3</u>  |
| To experience the character, food and lifestyle of the region | <u>4</u>  |
| To entertain visitors                                         | <u>5</u>  |
| Spend time with relatives/friends                             | <u>6</u>  |
| Time to relax with partner                                    | <u>7</u>  |
| Escape from everyday life                                     | <u>8</u>  |
| To discover something new or different                        | <u>9</u>  |
| A stop/diversion as part of a longer trip                     | <u>10</u> |
| Other/Don't know                                              | <u>11</u> |

**Q.13** Is your trip to this wine region part of an organised tour?

Yes 1  
 No 2  
 Don't Know 3

**Thinking of your visit today to this winery, can you rate the following areas on a 0–10 scale where 0=completely disagree and 10=completely agree. Write rating inside the box. If you are unable to give a rating write 'DK' (don't know) in the box.**

- Q.14** The staff are friendly
- Q.15** There was a good range of wines for tasting and buying
- Q.16** I tasted/purchased wines not readily available elsewhere
- Q.17** The staff were knowledgeable about wine
- Q.18** There were enough people to serve
- Q.19** There was a good range of food available
- Q.20** They catered well for children
- Q.21** The operating hours of the winery are ideal
- Q.22** The cellar door has great atmosphere
- Q.23** I learned something about wine today
- Q.24** I would consider purchasing wines made by this winery in the future
- Q.25** I had the chance to taste/buy some locally made produce
- Q.26** I was able to pick up some useful tips from the staff about things to do in this region

**Q.27** Did you spend time with the winemaker?

Yes 1  
 No 2  
 Don't Know 3

**GO TO Q.29→**  
**GO TO Q.29→**

**Q.28** How would you rate the experience of spending time with the winemaker on a 0–10 scale?  
**(WRITE NUMBER IN THE BOX)**

**Q.29** Did the cellar door have locally made arts, crafts or souvenirs on sale?

Yes 1  
 No 2  
 Don't Know 3

**GO TO Q.31→**  
**GO TO Q.31→**

**Q.30** How would you rate the range of arts, crafts and souvenirs on the 0–10 scale?  
**(WRITE NUMBER IN THE BOX)**

**Q.31** Was entertainment provided?

Yes 1  
 No 2  
 Don't Know 3

**GO TO Q.33→**  
**GO TO Q.33→**

**Q.32** How would you rate the entertainment provided on the 0–10 scale?  
**(WRITE NUMBER IN THE BOX)**

**Q.33** Overall, taking everything into account, how would you rate the experience of visiting this cellar door on a 0–10 scale?  
**(WRITE NUMBER IN THE BOX)**

**Thinking of your visit to this wine region, can you rate the following areas on the same 0–10 scale, where 0=very poor and 10=excellent**

- Q.34** Availability of food to buy or taste
- Q.35** Unspoiled (not too touristy)
- Q.36** Natural surroundings
- Q.37** Access to nearby national parks
- Q.38** Friendly locals
- Q.39** Local history and heritage
- Q.40** Art galleries and museums
- Q.41** Shopping in the local area
- Q.42** Range of local events and festivals
- Q.43** Range of cafes and restaurants
- Q.44** Range of accommodation available
- Q.45** Quality of tourist information available
- Q.46** Quality of roads in the area
- Q.47** Quality of signage for wineries on the road

**Q.48** What is your *first preference* for accommodation when staying in wine areas?  
**PLEASE CIRCLE ONE**

- Five-star resort 1
- Five-star boutique hotel 2
- Bed and Breakfast/guesthouse 3
- Staying with friends and relations 4
- Self contained cabin/cottage/house 5
- Mid-cost accommodation 6
- Modest price 7
- Cheap and cheerful accommodation 8
- Other/Don't Know 9



**Q.65** Which of these groups best describes your household?

|                                              |          |
|----------------------------------------------|----------|
| Single (or shared household)                 | <u>1</u> |
| Younger couple without kids (under 40 years) | <u>2</u> |
| Couple with young children                   | <u>3</u> |
| Couple with older children (teenagers)       | <u>4</u> |
| Older couple without kids (40 years plus)    | <u>5</u> |
| Older couple without dependent               | <u>6</u> |

**Q.66** Do you live in Australia or overseas?

|           |          |
|-----------|----------|
| Australia | <u>1</u> |
| Overseas  | <u>2</u> |

**Q.67 FOR OVERSEAS VISITORS ONLY**

What country do you live in?

**GO TO Q.71**

**Q.68 FOR AUSTRALIAN VISITORS ONLY**

Do you live in ...

|                        |          |
|------------------------|----------|
| Sydney                 | <u>1</u> |
| Elsewhere in NSW       | <u>2</u> |
| Elsewhere in Australia | <u>3</u> |

**Q.69** What is your postcode? **(OR SUBURB/TOWN IF NOT KNOWN)**

**Q.70** Which state or territory do you live in?

|                    |          |
|--------------------|----------|
| Queensland         | <u>1</u> |
| Victoria           | <u>2</u> |
| Tasmania           | <u>3</u> |
| South Australia    | <u>4</u> |
| Western Australia  | <u>5</u> |
| Northern Territory | <u>6</u> |
| ACT                | <u>7</u> |
| Other              | <u>8</u> |

**Q.71** Are you ...

|        |          |
|--------|----------|
| Male   | <u>1</u> |
| Female | <u>2</u> |

**Q.72** Which age group do you fall in?

|                     |          |
|---------------------|----------|
| 19 years or younger | <u>1</u> |
| 20–24 years         | <u>2</u> |
| 25–34 years         | <u>3</u> |
| 35–44 years         | <u>4</u> |
| 45–54 years         | <u>5</u> |
| 55–64 years         | <u>6</u> |
| 65 years and over   | <u>7</u> |
| REFUSED             | <u>8</u> |

**Q.73** What is the occupation of the main household income earner?

**Q.74** What group does your combined household income fall in?

|                  |          |
|------------------|----------|
| Under \$20,000   | <u>1</u> |
| \$20,000–35,000  | <u>2</u> |
| \$35,001–50,000  | <u>3</u> |
| \$50,001–70,000  | <u>4</u> |
| \$70,001–100,000 | <u>5</u> |
| Over \$100,000   | <u>6</u> |
| Overseas visitor | <u>7</u> |
| REFUSED          | <u>8</u> |

Thank you for completing this survey. Your answers will help this winery and Tourism NSW to continue to develop an excellent cellar door experience.

If you have any questions about this survey, contact Stollznow Research on 02 9953 7543 or email us at [info@stollznow.com.au](mailto:info@stollznow.com.au)



***—Appendix 3—  
Regression Analysis***

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**—APPENDIX 3—  
WINERIES REGRESSION ANALYSIS**

**Objective**

The objective of this analysis was to ascertain how various aspects of a winery and the broader wine region contribute to the overall enjoyment of the cellar door experience.

Do some aspects exhibit a relationship to overall enjoyment, and thus may be deemed ‘important’, while others do not?

**The Broad Approach**

Multiple linear regression.

**Data**

A total of N=546 respondents completed the survey. However, only N=495 respondents were included in the analysis as N=51 respondents were removed due to missing values (see below).

Rating scales were scored on an 11-point scale (0–10) plus a DK/NA option.

**Dependent Variable**

The dependent variable was the Overall Rating of the Cellar Door Experience (Q.33 on the questionnaire).

N=24 respondents gave a DK/NA rating for this question and were thus eliminated from the analysis.

**Independent Variables**

there were two sets of independent variables—variables relating to the specific winery being rated on the dependent variable, and variables relating to the wine region.

Respondents giving a DK/NA response to more than nine of the variables marked with a star below were eliminated from the analysis (a further N=27 respondents).

There were sixteen variables relating to the specific winery (see Q.14–32). Of these, the following 10 variables were treated as rating scales:

- Q.14\*—Staff were friendly
- Q.15\*—Good range of wines for tasting and buying
- Q.16\*—Tasted/Purchased wines not readily available elsewhere
- Q.17\*—Staff were knowledgeable about wine
- Q.18\*—Enough people to serve
- Q.20—Catered well for children
- Q.21\* – Operating hours ideal
- Q.22\*—Cellar door has great atmosphere
- Q.23\*—Learned something about wine today
- Q.24\*—Consider buying wine made by this winery in the future

The following three winery variables were scored on a rating scale but were treated as 0–1 variables where 1=a positive response and 0=a negative (0–4) or DK/NA response. This was because there were large numbers of DK/NA responses and/or the question was more suited to a Yes/No response:

Q.19—Good range of food available  
Q.25—Chance to taste/buy locally made product  
Q.26\*—Useful tips from staff about things to do in area

For the following three winery variables, respondents were first asked if the experience was available to them, and then asked to rate the experience if it was available (Q.27–32). As the experience was not available to a large number of respondents, and when the experience was available it was mostly positive, these variables were taken as 0–1 variables where 1=experience available (Yes), and 0=experience not available (No) or DK/NA.

Q.27—Spent time with wine maker  
Q.29—Locally made art/crafts/souvenirs at cellar door  
Q.31—Entertainment provided

There were fourteen variables relating to the wine region (see Q.34–47). Of these, the following 10 variables were treated as rating scales:

Q.34\*—Availability of food to taste  
Q.35\*—Unspoiled (not touristy)  
Q.36\*—Natural surroundings  
Q.38\*—Friendly locals  
Q.39\*—Local history and heritage  
Q.43\*—Range of cafes and restaurants  
Q.44\*—Range of accommodation available  
Q.45\*—Quality of tourist information available  
Q.46\*—Quality of roads in area  
Q.47\*—Quality of signage for wineries on the road

The following four wine area variables were scored on a rating scale but were treated as 0–1 variables where 1=a positive response and 0=a negative (0–4) or DK/NA response. This was because there were large numbers of DK/NA responses.

Q.37\*—Access to nearby national parks  
Q.40\*—Art/galleries and museums  
Q.41\*—Shopping in local area  
Q.42\*—Range of local event and festivals

In the analysis, remaining DK/NA responses in the rating scale variables were replaced by the mean for the variable. As the distribution of the rating scale responses typically had a 'long tail' (responses concentrated at the positive end of the scale, with sparse responses at the negative end), collapsing the negative responses together into a rating of four was also investigated. However, this had no material impact on the outcome of the analysis and so the results from the non-collapsed analysis are presented here.

## **The Analysis**

### ***Step 1 : Factor Analysis***

The objective was to see if the rather large number of IVs available could be reduced to a smaller number of meaningful, independent factors. The hope was that a few (say three or four) factors could be found that explained most of the variation in the IVs and that could be sensibly labelled as, say, 'Staff', 'Wine' and 'Operations'.

Unfortunately, the analysis was not successful. Only one factor had an eigenvalue greater than one, so the usual procedure would have resulted in only one factor being used identified, explaining only 40% of the variation in the data. If the factors with the next two largest eigenvalues were also used and rotated, 60% of the variation was explained, but the factors produced could not be interpreted meaningfully.

Thus, the original IVs as described above under 'Data' were used in the analysis.

### ***Step 2: Separation of Data into 'No kids'/'Kids'***

Of the N=495 respondents used in the analysis, N=453 were visiting without children, while N=42 respondents had children with them.

The variable 'Catered well for children' (Q.20) was only pertinent for the small number of respondents travelling with children. It could also be imagined that people visiting with children may have different needs and priorities in other areas to those travelling without children.

Thus, two separate analyses were conducted—one for respondents travelling without children, and one for those travelling with children. Q.20 was included as an IV for the second analysis only.

### ***Step 3: Multiple Linear Regression Analysis of Respondents Without Kids***

'Q.20—Catered well for children' was not included as an IV in any of these regression analyses.

**Regression Analysis 1: All Winery IVs Included in Model**

The regression was highly significant with an adjusted R<sup>2</sup> of 0.410.

The following IVs were significant at the 5% (\*\*) or 10% (\*) level of significance and had the beta co-efficient specified:

| Question # | Attribute                                               | Sig | Std Beta |
|------------|---------------------------------------------------------|-----|----------|
| Q.15       | Good range of wines for tasting and buying              | **  | 0.186    |
| Q.16       | Tasted/Purchased wines not readily available elsewhere  | *   | 0.069    |
| Q.22       | Cellar door has great atmosphere                        | **  | 0.279    |
| Q.24       | Consider buying wine made by this winery in the future  | **  | 0.128    |
| Q.26       | Useful tips from staff about things to do in area (0–1) | **  | 0.094    |

Thus, the better the atmosphere of the cellar door, the more enjoyable the overall cellar door experience tends to be (Q.22). Furthermore, having a good range of quality wines including some not readily available elsewhere also tends to add to the experience of visiting a cellar door (Q.15, Q.16, Q.24). Finally, if staff offer helpful advice about the broader wine region then this also tends to have a positive impact on the cellar door experience (Q.26—note this has been included as a 0–1 variable so is just a one-off Yes/No type benefit).

The full analysis output is below.

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .656 | .430     | .410              | 1.096                      |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df  | Mean Square | F      | Sig. |
|-------|------------|----------------|-----|-------------|--------|------|
| 1     | Regression | 395.959        | 15  | 26.397      | 21.962 | .000 |
|       | Residual   | 525.246        | 437 | 1.202       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Mode |                                                | Unstandardize Coefficient |      | Standardize Coefficient | t     | Sig. |
|------|------------------------------------------------|---------------------------|------|-------------------------|-------|------|
|      |                                                | B                         | Std. | Beta                    |       |      |
| 1    | (Constant                                      | 1.483                     | .504 |                         | 2.943 | .003 |
|      | Q14.WINERY - WERE                              | .065                      | .060 | .055                    | 1.093 | .275 |
|      | Q15.WINERY - RANGE OF WINES TASTING AND        | .190                      | .044 | .186                    | 4.331 | .000 |
|      | Q16.WINER TASTED/PURCHA WINES NOT AVAILABLE    | .043                      | .024 | .069                    | 1.776 | .076 |
|      | Q17.WINERY - KNOWLEDGEA ABOUT                  | .071                      | .060 | .062                    | 1.172 | .242 |
|      | Q18.WINERY - PEOPLE TO                         | .043                      | .036 | .051                    | 1.195 | .233 |
|      | Q19.GOOD FOOD -                                | .159                      | .116 | .054                    | 1.374 | .170 |
|      | Q21.WINER OPERATING IDEA                       | .005                      | .040 | .005                    | .127  | .899 |
|      | Q22.WINERY - DOOR HAS ATMOSPHE                 | .235                      | .041 | .279                    | 5.692 | .000 |
|      | Q23.WINERY - SOMETHING WINE                    | .017                      | .026 | .028                    | .638  | .524 |
|      | Q24.WINER CONSIDER WINES MADE BY WINERY IN THE | .110                      | .039 | .128                    | 2.811 | .005 |
|      | Q25.CHANCE LOCAL PRODUCT -                     | -.042                     | .131 | -.013                   | -.323 | .747 |
|      | Q26.USEFUL TIPS STAFF -                        | .293                      | .120 | .094                    | 2.444 | .015 |
|      | Q27.SPENT WINEMAKER -                          | .172                      | .128 | .049                    | 1.346 | .179 |
|      | Q29.LOCAL ART ETC CELLAR DOOR -                | -.009                     | .119 | -.003                   | -.078 | .938 |
|      | Q31.ENTERTAINM PROVIDED -                      | -.044                     | .146 | -.011                   | -.303 | .762 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR

### ***Regression Analysis 2: A Parsimonious Model Including Only the Winery IVs in the Model***

Forwards stepwise regression and backwards regression were used to search for a parsimonious model of the cellar door experience. Both methods resulted in the same outcome, with six IVs included in the model.

The regression was highly significant with an adjusted  $R^2$  of 0.413, indicating a comparable fit with full model.

Due to the multiple testing procedures used in the backward and stepwise regression, significance tests for the IVs are not sound and so are not reported here. However, we present the standardised beta co-efficients for the IVs selected:

| <b>Question #r</b> | <b>Attribute</b>                                        | <b>Std Beta</b> |
|--------------------|---------------------------------------------------------|-----------------|
| Q.15               | Good range of wines for tasting and buying              | 0.195           |
| Q.16               | Tasted/Purchased wines not readily available elsewhere  | 0.076           |
| Q.17               | Staff were knowledgeable about wine                     | 0.096           |
| Q.22               | Cellar door has great atmosphere                        | 0.232           |
| Q.24               | Consider buying wine made by this winery in the future  | 0.150           |
| Q.26               | Useful tips from staff about things to do in area (0–1) | 0.101           |

This parsimonious model is in good agreement with the overall model based on the winery variables alone. The main change is that Q.17 had entered the model as a significant attribute.

Thus, according to this parsimonious model, the better the atmosphere of the cellar door, the more enjoyable the overall cellar door experience tends to be (Q.22). Having a good range of quality wines including some not readily available elsewhere also tends to add to the experience of visiting a cellar door (Q.15, Q.16, Q.24).

Finally, staff being knowledgeable about wine (Q.17) and if staff offer helpful advice about the broader wine region then this also tends to have a positive impact on the cellar door experience (Q.26—note this has been included as a 0–1 variable so is just a one-off Yes/No type benefit).

The full analysis output is below.

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .649 | .421     | .413              | 1.094                      |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df  | Mean Square | F      | Sig. |
|-------|------------|----------------|-----|-------------|--------|------|
| 1     | Regression | 387.677        | 6   | 64.613      | 54.013 | .000 |
|       | Residual   | 533.528        | 446 | 1.196       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | 1.752                       | .423       |                           | 4.146 | .000 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .198                        | .043       | .195                      | 4.637 | .000 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | .047                        | .024       | .076                      | 1.962 | .050 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .109                        | .053       | .096                      | 2.050 | .041 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .272                        | .037       | .323                      | 7.275 | .000 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .129                        | .037       | .150                      | 3.491 | .001 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .314                        | .116       | .101                      | 2.704 | .007 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Regression Analysis 3: Adding Wine Region IVs to the Model Including All Winery Variables**

This analysis was run to resolve the specific a priori question, ‘Do aspects of the wine region add to the cellar door experience?’. Thus, in this first model including wine region variables we check if the wine region variables as a whole improve the model.

Consider the ANOVA tables below.

**ANOVA<sup>c</sup>**

| Model |            | Sum of Squares | df  | Mean Square | F      | Sig. |
|-------|------------|----------------|-----|-------------|--------|------|
| 1     | Regression | 395.959        | 15  | 26.397      | 21.962 | .000 |
|       | Residual   | 525.246        | 437 | 1.202       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |
| 2     | Regression | 417.040        | 29  | 14.381      | 12.066 | .000 |
|       | Residual   | 504.166        | 423 | 1.192       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |

c. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

The first table is the ANOVA table for the model including the winery IVs only. The second table is for the model including all the winery IVs and all the wine region IVs. The second table can be broken out further as follows:

|                                  | SS      | df  | MS     | F      | Sig   |
|----------------------------------|---------|-----|--------|--------|-------|
| Regression                       | 417.040 | 29  | 14.381 | 12.066 | 0.000 |
| Due to winery IVs only           | 395.959 | 15  | 26.397 | 22.145 | 0.000 |
| Due to including wine region IVs | 21.081  | 14  | 1.506  | 1.263  | 0.227 |
| Residual                         | 504.166 | 423 | 1.192  |        |       |
| Total                            | 921.205 | 452 |        |        |       |

Overall, the wine region variables did not add significantly to the regression (p=0.227). Note, however, that the wine region IV ‘Q.47—Quality of signage for wineries on the road’ was significant at p<0.05. This is investigated further in the next regression analysis.

Below is the remaining output from this analysis:

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .673 | .453     | .415              | 1.092                      |

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t      | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|--------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |        |      |
| 1     | (Constant)                                                           | 1.128                       | .573       |                           | 1.967  | .050 |
|       | Q14.WINERY - STAFF WERE FRIENDLY                                     | .062                        | .061       | .052                      | 1.027  | .305 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .179                        | .045       | .176                      | 3.985  | .000 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | .048                        | .025       | .077                      | 1.933  | .054 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .049                        | .062       | .043                      | .786   | .432 |
|       | Q18.WINERY - ENOUGH PEOPLE TO SERVE                                  | .027                        | .037       | .032                      | .729   | .467 |
|       | Q19.GOOD RANGE FOOD - 2PT                                            | .102                        | .121       | .035                      | .843   | .400 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .010                        | .041       | .011                      | .249   | .803 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .220                        | .042       | .261                      | 5.195  | .000 |
|       | Q23.WINERY - LEARNED SOMETHING ABOUT WINE TODAY                      | .016                        | .027       | .026                      | .576   | .565 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .098                        | .040       | .113                      | 2.456  | .014 |
|       | Q25.CHANCE TASTE LOCAL PRODUCT - 2PT                                 | -.032                       | .133       | -.009                     | -.236  | .813 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .306                        | .123       | .099                      | 2.492  | .013 |
|       | Q27.SPENT TIME WINEMAKER - 2PT                                       | .164                        | .131       | .047                      | 1.253  | .211 |
|       | Q29.LOCAL ART ETC AT CELLAR DOOR - 2PT                               | -.021                       | .122       | -.007                     | -.168  | .866 |
|       | Q31.ENTERTAINMENT PROVIDED - 2PT                                     | -.084                       | .151       | -.022                     | -.557  | .578 |
|       | Q34.WINE AREA - AVAILABILITY OF FOOD TO TASTE                        | .026                        | .026       | .044                      | 1.014  | .311 |
|       | Q35.WINE AREA - UNSPOILED (NOT TOURISTY)                             | -.007                       | .041       | -.008                     | -.162  | .872 |
|       | Q36.WINE AREA - NATURAL SURROUNDINGS                                 | -.012                       | .053       | -.011                     | -.221  | .825 |
|       | Q37.WINE AREA - ACCESS TO NEARBY NATIONAL PARKS - 2PT                | .173                        | .128       | .059                      | 1.355  | .176 |
|       | Q38.WINE AREA - FRIENDLY LOCALS                                      | .039                        | .045       | .039                      | .869   | .385 |
|       | Q39.WINE AREA - LOCAL HISTORY AND HERITAGE - 2PT                     | -.152                       | .151       | -.045                     | -1.009 | .314 |
|       | Q40.WINE AREA - ART GALLERIES AND MUSEUMS - 2PT                      | -.126                       | .144       | -.042                     | -.874  | .383 |
|       | Q41.WINE AREA - SHOPPING IN LOCAL AREA - 2PT                         | .082                        | .148       | .026                      | .557   | .578 |
|       | Q42.WINE AREA - RANGE OF LOCAL EVENT AND FESTIVALS - 2PT             | -.055                       | .145       | -.018                     | -.379  | .705 |
|       | Q43.WINE AREA - RANGE OF CAFES AND RESTAURANTS                       | .001                        | .037       | .001                      | .032   | .975 |
|       | Q44.WINE AREA - RANGE OF ACCOMMODATION AVAILABLE                     | .047                        | .044       | .052                      | 1.076  | .283 |
|       | Q45.WINE AREA - QUALITY OF TOURIST INFORMATION AVAILABLE             | -.054                       | .040       | -.063                     | -1.341 | .181 |
|       | Q46.WINE AREA - QUALITY OF ROADS IN AREA                             | .031                        | .023       | .057                      | 1.347  | .179 |
|       | Q47.WINE AREA - QUALITY OF SIGNAGE FOR WINERIES ON THE ROAD          | .068                        | .032       | .094                      | 2.155  | .032 |

<sup>a</sup>. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

#### ***Regression Analysis 4: Using Stepwise Regression to Add Wine Region IVs to the Model Including all Winery IVs***

In the analysis above we found that overall the wine region IVs did not add to our understanding of overall cellar door experience. However, it may be that some important variables are being hidden by other unimportant variables, so a further analysis was conducted to investigate this possibility.

The obvious first step would be to enter Q.47 into the model as identified above. However, to search for all relevant IVs a variation on the forwards stepwise method was employed.

A regression analysis was conducted where all winery IVs were entered into the model and then a forwards stepwise approach was used to investigate the value of adding individual wine region IVs to the model.

Using this approach, one wine region IV was added to the model, 'Q.47—Quality of signage for wineries on the road', the IV identified in the full analysis.

This regression was highly significant with an adjusted  $R^2$  of 0.419. Note, that it is a significant improvement over the model without Q.47 included.

Once again, as the stepwise approach is used we will not focus on the significance tests for the individual attributes:

| <b>Question #</b> | <b>Attribute</b>                                        | <b>Std Beta</b> |
|-------------------|---------------------------------------------------------|-----------------|
| Q.15              | Good range of wines for tasting and buying              | 0.185           |
| Q.16              | Tasted/Purchased wines not readily available elsewhere  | 0.081           |
| Q.22              | Cellar door has great atmosphere                        | 0.270           |
| Q.24              | Consider buying wine made by this winery in the future  | 0.129           |
| Q.26              | Useful tips from staff about things to do in area (0–1) | 0.097           |
| Q.47              | Quality of signage for wineries on the road             | 0.111           |

Thus, similarly to Regression Analysis 1, the better the atmosphere of the cellar door, the more enjoyable the overall cellar door experience tends to be (Q.22).

Having a good range of quality wines including some not readily available elsewhere also tends to add to the experience of visiting a cellar door (Q.15, Q.16, Q.24).

And, if staff offer helpful advice about the broader wine region then this also tends to have a positive impact on the cellar door experience (Q.26—note this has been included as a 0–1 variable so is just a one-off Yes/No type benefit). Added to this, clear sign posting of the winery also tends to improve the cellar door experience (Q.47).

The full analysis output is below and overleaf:

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .662 | .439     | .419              | 1.088                      |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df  | Mean Square | F      | Sig. |
|-------|------------|----------------|-----|-------------|--------|------|
| 1     | Regression | 404.106        | 15  | 26.940      | 22.767 | .000 |
|       | Residual   | 517.099        | 437 | 1.183       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | 1.374                       | .487       |                           | 2.821 | .005 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .189                        | .043       | .185                      | 4.377 | .000 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | .051                        | .024       | .081                      | 2.099 | .036 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .079                        | .056       | .069                      | 1.394 | .164 |
|       | Q18.WINERY - ENOUGH PEOPLE TO SERVE                                  | .044                        | .036       | .051                      | 1.221 | .223 |
|       | Q19.GOOD RANGE FOOD - 2PT                                            | .152                        | .115       | .052                      | 1.321 | .187 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .009                        | .040       | .010                      | .233  | .816 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .227                        | .041       | .270                      | 5.581 | .000 |
|       | Q23.WINERY - LEARNED SOMETHING ABOUT WINE TODAY                      | .012                        | .026       | .019                      | .444  | .657 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .111                        | .038       | .129                      | 2.892 | .004 |
|       | Q25.CHANCE TASTE LOCAL PRODUCT - 2PT                                 | -.046                       | .130       | -.014                     | -.358 | .721 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .300                        | .119       | .097                      | 2.524 | .012 |
|       | Q27.SPENT TIME WINEMAKER - 2PT                                       | .196                        | .127       | .056                      | 1.541 | .124 |
|       | Q29.LOCAL ART ETC AT CELLAR DOOR - 2PT                               | -.014                       | .118       | -.004                     | -.115 | .908 |
|       | Q31.ENTERTAINMENT PROVIDED - 2PT                                     | -.088                       | .146       | -.023                     | -.600 | .549 |
|       | Q47.WINE AREA - QUALITY OF SIGNAGE FOR WINERIES ON THE ROAD          | .080                        | .028       | .111                      | 2.846 | .005 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

***Regression Analysis 5: A Parsimonious Model Utilising Winery and Wine Region IVs***

Finally, we may wish to formulate a parsimonious model, utilising both the winery and wine region IVs. To achieve this a two phase forwards stepwise procedure was employed.

First a parsimonious model based on the winery IVs only was developed using forwards stepwise regression. This model was as per Regression Model 2. Then forwards stepwise regression was used to add wine region IVs as appropriate, to see if they could add anything over and above the information contained in the winery IVs. This resulted in only Q.47 being added to the model.

This regression was highly significant with an adjusted R<sup>2</sup> of 0.422.

| <b>Question #</b> | <b>Attribute</b>                                        | <b>Std Beta</b> |
|-------------------|---------------------------------------------------------|-----------------|
| Q.15              | Good range of wines for tasting and buying              | 0.188           |
| Q.16              | Tasted/Purchased wines not readily available elsewhere  | 0.086           |
| Q.17              | Staff were knowledgeable about wine                     | 0.081           |
| Q.22              | Cellar door has great atmosphere                        | 0.300           |
| Q.24              | Consider buying wine made by this winery in the future  | 0.142           |
| Q.26              | Useful tips from staff about things to do in area (0–1) | 0.104           |
| Q.47              | Quality of signage for wineries on the road             | 0.109           |

Thus, the better the atmosphere of the cellar door, the more enjoyable the overall cellar door experience tends to be (Q.22). Having a good range of quality wines including some not readily available elsewhere also tends to add to the experience of visiting a cellar door (Q.15, Q.16, Q.24). And, if staff offer helpful advice about the broader wine region then this also tends to have a positive impact on the cellar door experience (Q.26—note this has been included as a 0–1 variable so is just a one-off Yes/No type benefit). Added to this, clear sign posting of the winery also tends to improve the cellar door experience (Q.47).

The full analysis output is overleaf.

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .657 | .431     | .422              | 1.085                      |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df  | Mean Square | F      | Sig. |
|-------|------------|----------------|-----|-------------|--------|------|
| 1     | Regression | 397.219        | 7   | 56.746      | 48.192 | .000 |
|       | Residual   | 523.986        | 445 | 1.177       |        |      |
|       | Total      | 921.205        | 452 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | 1.492                       | .429       |                           | 3.479 | .001 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .191                        | .042       | .188                      | 4.494 | .000 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | .054                        | .024       | .086                      | 2.237 | .026 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .093                        | .053       | .081                      | 1.744 | .082 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .253                        | .038       | .300                      | 6.707 | .000 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .123                        | .037       | .142                      | 3.325 | .001 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .324                        | .115       | .104                      | 2.808 | .005 |
|       | Q47.WINE AREA - QUALITY OF SIGNAGE FOR WINERIES ON THE ROAD          | .079                        | .028       | .109                      | 2.847 | .005 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Step 4 : Multiple Linear Regression Analysis of Respondents With Kids**

This analysis is based on a small sample (N=42) and should be taken as indicative only.

In addition to the variables explored in the Without Kids analyses, ‘Q.20—Catered well for children’ was included as an IV in these regression analyses.

Output of the analyses is given below. Please see the conclusions section for discussion of the results.

**Regression Analysis 1: All Winery IVs Included in Model**

The regression was highly significant with an adjusted R<sup>2</sup> of 0.726.

The following IVs were significant at the 5% (\*\*) or 10% (\*) level of significance and had the beta co-efficient specified:

| Question # | Attribute                                              | Sig | Std Beta |
|------------|--------------------------------------------------------|-----|----------|
| Q.19       | Good range of food available (0–1)                     | *   | 0.207    |
| Q.20       | Catered well for children                              | *   | 0.251    |
| Q.21       | Operating hours ideal                                  | **  | 0.355    |
| Q.24       | Consider buying wine made by this winery in the future | **  | 0.420    |

The full analysis output is below.

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .913 | .833     | .726              | .748                       |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df | Mean Square | F     | Sig. |
|-------|------------|----------------|----|-------------|-------|------|
| 1     | Regression | 69.659         | 16 | 4.354       | 7.783 | .000 |
|       | Residual   | 13.984         | 25 | .559        |       |      |
|       | Total      | 83.643         | 41 |             |       |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | .843                        | 1.406      |                           | .599  | .554 |
|       | Q14.WINERY - STAFF WERE FRIENDLY                                     | -.133                       | .157       | -.119                     | -.848 | .404 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .056                        | .102       | .064                      | .548  | .589 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | -.063                       | .080       | -.095                     | -.792 | .436 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .064                        | .125       | .070                      | .511  | .614 |
|       | Q18.WINERY - ENOUGH PEOPLE TO SERVE                                  | .180                        | .149       | .186                      | 1.207 | .239 |
|       | Q19.GOOD RANGE FOOD - 2PT                                            | .647                        | .345       | .207                      | 1.878 | .072 |
|       | Q20.WINERY - CATERED WELL FOR CHILDREN                               | .123                        | .064       | .251                      | 1.931 | .065 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .293                        | .111       | .355                      | 2.643 | .014 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .024                        | .141       | .028                      | .172  | .864 |
|       | Q23.WINERY - LEARNED SOMETHING ABOUT WINE TODAY                      | .024                        | .073       | .052                      | .335  | .740 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .290                        | .078       | .420                      | 3.730 | .001 |
|       | Q25.CHANCE TASTE LOCAL PRODUCT - 2PT                                 | -.131                       | .312       | -.043                     | -.420 | .678 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .181                        | .302       | .064                      | .597  | .556 |
|       | Q27.SPENT TIME WINEMAKER - 2PT                                       | .605                        | .360       | .206                      | 1.684 | .105 |
|       | Q29.LOCAL ART ETC AT CELLAR DOOR - 2PT                               | .352                        | .309       | .124                      | 1.139 | .266 |
|       | Q31.ENTERTAINMENT PROVIDED - 2PT                                     | -.166                       | .556       | -.030                     | -.300 | .767 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Regression Analysis 2: A Parsimonious Model Including Only the Winery IVs in the Model**

Forwards stepwise regression and backwards regression were used to search for a parsimonious model of the cellar door experience. The two methods resulted in different outcomes.

The forwards stepwise results are presented first:

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .834 | .696     | .672              | .818                       |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df | Mean Square | F      | Sig. |
|-------|------------|----------------|----|-------------|--------|------|
| 1     | Regression | 58.219         | 3  | 19.406      | 29.005 | .000 |
|       | Residual   | 25.424         | 38 | .669        |        |      |
|       | Total      | 83.643         | 41 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | 1.150                       | .797       |                           | 1.443 | .157 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .196                        | .086       | .238                      | 2.276 | .029 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | .321                        | .089       | .372                      | 3.608 | .001 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .356                        | .064       | .516                      | 5.528 | .000 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

And now the backwards regression results:

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .903 | .815     | .777              | .675                       |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df | Mean Square | F      | Sig. |
|-------|------------|----------------|----|-------------|--------|------|
| 1     | Regression | 68.169         | 7  | 9.738       | 21.398 | .000 |
|       | Residual   | 15.474         | 34 | .455        |        |      |
|       | Total      | 83.643         | 41 |             |        |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t     | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|-------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |       |      |
| 1     | (Constant)                                                           | .641                        | .945       |                           | .678  | .503 |
|       | Q18.WINERY - ENOUGH PEOPLE TO SERVE                                  | .156                        | .084       | .162                      | 1.859 | .072 |
|       | Q19.GOOD RANGE FOOD - 2PT                                            | .660                        | .251       | .211                      | 2.631 | .013 |
|       | Q20.WINERY - CATERED WELL FOR CHILDREN                               | .123                        | .050       | .252                      | 2.490 | .018 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .313                        | .070       | .380                      | 4.506 | .000 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .268                        | .058       | .389                      | 4.614 | .000 |
|       | Q27.SPENT TIME WINEMAKER - 2PT                                       | .681                        | .254       | .231                      | 2.684 | .011 |
|       | Q29.LOCAL ART ETC AT CELLAR DOOR - 2PT                               | .399                        | .218       | .141                      | 1.830 | .076 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

***Regression Analysis 3: Adding Wine Region IVs to the Model Including All Winery Variables***

This analysis was run to resolve the specific a priori question, 'Do aspects of the wine region add to the cellar door experience?'. Thus, in this first model including wine region variables we check if the wine region variables as a whole improve the model.

Consider the ANOVA tables below:

**ANOVA<sup>c</sup>**

| Model |            | Sum of Squares | df | Mean Square | F     | Sig. |
|-------|------------|----------------|----|-------------|-------|------|
| 1     | Regression | 69.659         | 16 | 4.354       | 7.783 | .000 |
|       | Residual   | 13.984         | 25 | .559        |       |      |
|       | Total      | 83.643         | 41 |             |       |      |
| 2     | Regression | 75.003         | 30 | 2.500       | 3.183 | .023 |
|       | Residual   | 8.640          | 11 | .785        |       |      |
|       | Total      | 83.643         | 41 |             |       |      |

c. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

The first table is the ANOVA table for the model including the winery IVs only. The second table is for the model including all the winery IVs and all the wine region IVs. The second table can be broken out further as follows:

|                                  | SS     | df | MS    | F     | Sig   |
|----------------------------------|--------|----|-------|-------|-------|
| Regression                       | 75.003 | 29 | 2.500 | 3.183 | 0.023 |
| Due to winery IVs only           | 69.659 | 16 | 4.354 | 5.546 | 0.003 |
| Due to including wine region IVs | 5.344  | 14 | 0.486 | 0.619 | 0.803 |
| Residual                         | 8.640  | 11 | 0.785 |       |       |
| Total                            | 83.643 | 41 |       |       |       |

Overall, the wine region variables did not add significantly to the regression (p=0.803). The full analysis is given below. Note that none of the wine region IVs was significant.

**Model Summary**

| Model | R    | R Square | Adjusted R Square | Std. Error of the Estimate |
|-------|------|----------|-------------------|----------------------------|
| 1     | .947 | .897     | .615              | .886                       |

**ANOVA<sup>b</sup>**

| Model |            | Sum of Squares | df | Mean Square | F     | Sig. |
|-------|------------|----------------|----|-------------|-------|------|
| 1     | Regression | 75.003         | 30 | 2.500       | 3.183 | .023 |
|       | Residual   | 8.640          | 11 | .785        |       |      |
|       | Total      | 83.643         | 41 |             |       |      |

b. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

**Coefficients<sup>a</sup>**

| Model |                                                                      | Unstandardized Coefficients |            | Standardized Coefficients | t      | Sig. |
|-------|----------------------------------------------------------------------|-----------------------------|------------|---------------------------|--------|------|
|       |                                                                      | B                           | Std. Error | Beta                      |        |      |
| 1     | (Constant)                                                           | .921                        | 3.496      |                           | .264   | .797 |
|       | Q14.WINERY - STAFF WERE FRIENDLY                                     | -.096                       | .332       | -.086                     | -.290  | .777 |
|       | Q15.WINERY - GOOD RANGE OF WINES FOR TASTING AND BUYING              | .051                        | .185       | .058                      | .274   | .789 |
|       | Q16.WINERY - TASTED/PURCHASED WINES NOT READILY AVAILABLE ELSEWHERE  | -.145                       | .181       | -.217                     | -.799  | .441 |
|       | Q17.WINERY - STAFF KNOWLEDGEABLE ABOUT WINE                          | .001                        | .243       | .001                      | .003   | .997 |
|       | Q18.WINERY - ENOUGH PEOPLE TO SERVE                                  | .243                        | .307       | .252                      | .789   | .447 |
|       | Q19.GOOD RANGE FOOD - 2PT                                            | .514                        | .611       | .165                      | .841   | .418 |
|       | Q20.WINERY - CATERED WELL FOR CHILDREN                               | .055                        | .120       | .113                      | .459   | .655 |
|       | Q21.WINERY - OPERATING HOURS IDEAL                                   | .273                        | .187       | .331                      | 1.460  | .172 |
|       | Q22.WINERY - CELLAR DOOR HAS GREAT ATMOSPHERE                        | -.015                       | .214       | -.018                     | -.073  | .943 |
|       | Q23.WINERY - LEARNED SOMETHING ABOUT WINE TODAY                      | .022                        | .159       | .047                      | .139   | .892 |
|       | Q24.WINERY - CONSIDER BUYING WINES MADE BY THIS WINERY IN THE FUTURE | .344                        | .113       | .499                      | 3.054  | .011 |
|       | Q25.CHANCE TASTE LOCAL PRODUCT - 2PT                                 | -.301                       | .513       | -.099                     | -.587  | .569 |
|       | Q26.USEFUL TIPS FROM STAFF - 2PT                                     | .504                        | .526       | .178                      | .958   | .359 |
|       | Q27.SPENT TIME WINEMAKER - 2PT                                       | .534                        | .489       | .181                      | 1.092  | .298 |
|       | Q29.LOCAL ART ETC AT CELLAR DOOR - 2PT                               | .104                        | .532       | .037                      | .196   | .848 |
|       | Q31.ENTERTAINMENT PROVIDED - 2PT                                     | -.076                       | 1.033      | -.014                     | -.074  | .943 |
|       | Q34.WINE AREA - AVAILABILITY OF FOOD TO TASTE                        | -.091                       | .119       | -.150                     | -.758  | .464 |
|       | Q35.WINE AREA - UNSPOILED (NOT TOURISTY)                             | .140                        | .215       | .185                      | .653   | .527 |
|       | Q36.WINE AREA - NATURAL SURROUNDINGS                                 | -.116                       | .310       | -.099                     | -.373  | .716 |
|       | Q37.WINE AREA - ACCESS TO NEARBY NATIONAL PARKS - 2PT                | -.330                       | .909       | -.110                     | -.363  | .723 |
|       | Q38.WINE AREA - FRIENDLY LOCALS                                      | .157                        | .172       | .145                      | .911   | .382 |
|       | Q39.WINE AREA - LOCAL HISTORY AND HERITAGE - 2PT                     | -.917                       | .915       | -.277                     | -1.002 | .338 |
|       | Q40.WINE AREA - ART GALLERIES AND MUSEUMS - 2PT                      | 1.019                       | 1.131      | .334                      | .901   | .387 |
|       | Q41.WINE AREA - SHOPPING IN LOCAL AREA - 2PT                         | -.499                       | 1.067      | -.155                     | -.468  | .649 |
|       | Q42.WINE AREA - RANGE OF LOCAL EVENT AND FESTIVALS - 2PT             | .117                        | .940       | .037                      | .124   | .903 |
|       | Q43.WINE AREA - RANGE OF CAFES AND RESTAURANTS                       | .143                        | .262       | .190                      | .546   | .596 |
|       | Q44.WINE AREA - RANGE OF ACCOMMODATION AVAILABLE                     | -.070                       | .208       | -.092                     | -.335  | .744 |
|       | Q45.WINE AREA - QUALITY OF TOURIST INFORMATION AVAILABLE             | -.042                       | .181       | -.040                     | -.229  | .823 |
|       | Q46.WINE AREA - QUALITY OF ROADS IN AREA                             | -.065                       | .142       | -.112                     | -.462  | .653 |
|       | Q47.WINE AREA - QUALITY OF SIGNAGE FOR WINERIES ON THE ROAD          | .099                        | .167       | .114                      | .592   | .566 |

a. Dependent Variable: Q33.OVERALL RATING OF CELLAR DOOR EXPERIENCE

***Regression Analysis 4: Using Stepwise Regression to Add Wine Region IVs to the Model Including all Winery IVs***

In the analysis above we found that overall the wine region IVs did not add to our understanding of overall cellar door experience. Although unlikely (given the significance value attached to the wine area IVs and the fact that no individual IV was significant) it may be that some important variables are being hidden by other unimportant variables so, for completeness, a further analysis was conducted to investigate this possibility.

A regression analysis was conducted where all winery IVs were entered into the model and then a forwards stepwise approach was used to investigate the value of adding individual wine region IVs to the model.

Using this approach, no wine region IVs were added to the model. The outcome was exactly the same as for Model 1. Thus, it appears that the wine region IVs are not adding to our understanding of the cellar door experience for these respondents with children.

**Conclusion**

***Without Kids***

The various models explored showed a high level of consistency which reassures us that the variables identified as having a relationship to 'Q.33—Overall rating of cellar door experience' are indeed of value.

The table below summarises the standardised beta co-efficients from Models 1–5.

| Question   | Standardised Beta Co-efficients |         |         |         |         |
|------------|---------------------------------|---------|---------|---------|---------|
|            | Model 1                         | Model 2 | Model 3 | Model 4 | Model 5 |
| Q.22       | 0.279                           | 0.232   | 0.261   | 0.270   | 0.300   |
| Q.15       | 0.186                           | 0.195   | 0.176   | 0.185   | 0.188   |
| Q.24       | 0.128                           | 0.150   | 0.113   | 0.129   | 0.142   |
| Q.47       | NA                              | NA      | 0.094   | 0.111   | 0.109   |
| Q.16       | 0.069                           | 0.076   | 0.077   | 0.081   | 0.086   |
| Q.17       | NA                              | 0.096   | NA      | NA      | 0.081   |
| Q.26 (0–1) | 0.094                           | 0.101   | 0.099   | 0.097   | 0.104   |

The size of the standardised beta co-efficients are quite consistent across the models. In particular, the ranking of the variables by standardised beta co-efficient is nearly identical for each model.

Given this consistency, we can with some confidence infer that 'Q.22—Cellar door has great atmosphere' has the largest influence in the appreciation of the cellar door experience. In market research, this is often referred to as being the 'most important'. 'Q.15—Good range of wines for tasting and buying' and 'Q.24—Consider buying wine made by this winery in the future', which relate to the range and quality of the wines available at the cellar door, were perhaps the next 'most important'.

Another wine attribute, 'Q.16—Tasted/Purchased wines not readily available elsewhere', and a wine region attribute, 'Q.47—Quality of signage for wineries on the road' were also 'important'. This indicates that new/boutique/rare/unique wine tasting experiences and locating the winery easily also add to the cellar door experience.

The other two attributes to emerge as 'important' were related to the cellar door staff. 'Q.17—Staff were knowledgeable about wine' was identified in the parsimonious models while 'Q.26—Useful tips from staff about things to do in area (0–1)' was present in all the models. This suggests that visitors appreciate learning more about the wine they are tasting and that they also appreciate staff showing a broader interest in their trip to the wineries, and that this adds to the cellar door experience.

### ***With Kids***

With only N=42 respondents, this analysis was only ever going to provide an indicative outcome.

However, unfortunately we saw a lot of inconsistency on the variables that were significant in the regression analyses for 'Q.33—Overall rating of cellar door experience'. The only consistent outcome was that 'Q.24—Consider buying wine made by this winery in the future' appeared as significant in all models.

The variable that was of particular interest here, 'Q.20—Catered well for children', was significant at the 10% level in the first model where all winery variables were included in the model. However, it was not significant in any of the other models investigated.

For this limited sample, the wine region IVs did not add to our understanding of the cellar door experience for these respondents visiting with children.

Overall, this analysis was inconclusive. The most confident statement we can make about this group of respondents who visited with children is that, in common with visitors visiting without children, tasting quality wines appears to have some bearing on their enjoyment of the cellar door experience. However, it is unclear whether specifically catering for children's needs adds any value to the cellar door experience for these visitors.