

Wine Tourism Research Cellar Door Survey

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Prepared by Tourism New South Wales
Information & Research Unit



Tourism New South Wales

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1. Executive Summary

A recent study conducted among New South Wales wineries with cellar door facilities revealed the following;

- ▶ New South Wales is estimated to have over 210 wineries with cellar door facilities.
- ▶ The number of estimated visits to New South Wales wineries in 2001 was 4.1 million.
- ▶ 70% of visits to New South Wales wineries were made by people from within the State, 22% were from interstate and the remaining 8% were from overseas.
- ▶ Approximately 2,800 people are employed in New South Wales wineries in various roles, including grape growing/wine making, cellar door services, restaurant and food services and accommodation.
- ▶ Over one third, or 35% of these staff are employed in visitor services and retail operations.
- ▶ The estimated total turnover of wineries with cellar doors in New South Wales was \$92.9 million in 2001.
- ▶ The estimated expenditure generated from wine tourism in New South Wales in 2001 is \$353 million¹.
- ▶ Peak visits to New South Wales wineries tends to coincide with Easter and other holiday periods. The most popular months for visitation being April, October, September and December.
- ▶ The Hunter tourism region received the largest proportion of visits to New South Wales wineries (72%), followed by Explorer Country (10%), Sydney tourism region (7%) and the South Coast (4%).

2. Introduction

The Food & Wine Plan 2000, produced by Tourism New South Wales identified a number of priority strategies to meet the key objectives of the plan. One of these strategies related to Industry and Market Research.

In particular it was identified that Tourism New South Wales assist the NSW wine industry to establish wine tourism industry performance measures (or benchmarks) against which to measure visitor and sales trends and the impact of wine tourism marketing.

¹This estimation is based on the average daily expenditure of all day trip and overnight visitors in NSW.



3. Objectives

The objectives of the study were to;

- Conduct an industry benchmarking survey
- Establish a base for monitoring the number of visits to NSW wineries and the source markets from which they come.
- Establish the extent of visitor facilities at each winery and trends in this regard.

4. Applications of the Research

The study will provide a benchmark against which to measure visitor and sales trends and the impact of wine tourism marketing.

5. Methodology

A database of wineries with cellar door facilities was compiled using details provided by the Wine Industry Association of its members and from the Wine Industry Directory²

A letter was sent to respondents prior to being contacted by interviewers (see Attachment 1). Respondents were advised of the survey and asked to calculate in advance monthly estimates of visitation, 65% of respondents recalled having received this letter when contacted.

Of all respondents 83% had monthly estimates of visits available and were able to give these answers to the interviewer when they called. This was a very high rate of cooperation to a detailed question.

A telephone survey of the 217 wineries in NSW, with cellar door facilities, was conducted between 9-15 January 2002. The Cellar Door Manager was surveyed in most instances. The survey examined the supply side of wine tourism, therefore, all details which refer to visitors are based on records kept by the winery operator. A separate survey of visitors, or a demand side survey will be conducted at a later time. A response rate of 72% was achieved giving a total sample of 157 wineries. The research was conducted by the market research agency AC Nielsen.

As well as total results, survey results were also provided on a number of other criteria. These included the number of employees, annual turnover, tourism region and wine region.

It should be noted that whilst regional data is available some of the sample bases are quite small and the results should be used with caution. See Attachment 2 for sample sizes.

²The Australian & New Zealand Wine Industry Directory, 19th Annual Edition 2001. Winetitles.



6. Summary of Main Findings

6.1 Visits to New South Wales Wineries

Results from the study revealed that approximately 4.1 million visits were made to New South Wales wineries with cellar doors in 2001 (See Section 6.19).

6.2 Number employed at Winery

It was estimated that approximately 2,800 people were employed in NSW wineries in 2001.

The majority of wineries were small businesses, almost 90% employing fewer than 20 staff. On average 57% of wineries surveyed employed less than 5 employees. A further 24% employed between 5 and 10 staff members. The average number employed was 13.

Of NSW tourism regions the Riverina had the largest number of staff at each winery on average (54). Wineries in the Murray Region had an average of 21 staff employed at their winery while the Hunter had 13 staff employed at their wineries on average.

Looking at the States wine regions, the Riverina/Griffith wine region had the largest number of staff employed at their wineries on average (54), followed by the Lower Hunter Valley (14). Murray/ Darling/ Perricoota also had 15 staff employed on average at their wineries.

6.3 Number employed in Visitor Services & Retail Operations

Most wineries employ fewer than 5 staff in visitor services and retail operations (79%). The average number employed in this sector of operations was 5. That is, a third of all staff employed.

Of NSW's tourism regions the Hunter had the largest number of staff employed in visitor services and retail operations at each winery on average (6). Wineries in the Mid North Coast/Holiday Coast Regions had an average of 5 staff employed in visitor services and retail operations at their winery, while the Riverina had 5 staff employed in these areas on average.

The Lower Hunter Valley wine region had the largest number of staff employed at their wineries in visitor services on average (7), followed by the Riverina/Griffith (5) and New England/North West/Northern/ Hastings (5).

6.4 Origin of Visits

Important Note: The results presented in Section 6.4, describing origin of visits are based on information kept by wineries. Not from the results of a consumer survey.

On average, 71% of visits to wineries in NSW, with cellar door facilities, were from within NSW. 20% were from within the local government area in which the winery is located and a further 50% were from elsewhere in the State.

The remaining 29% of visits were from interstate (21%) or overseas (8%). The major interstate markets being Victoria (7%) and Queensland (8%).

6.4.1 Origin – Local Area

In terms of origin to wineries by NSW tourism region the Sydney tourism region had the highest proportion of visits from its local area (39%), followed by the Mid North Coast/Holiday Coast Regions (36%). Capital Country/Southern Highlands/Snowy had 30% of its visits from the local area.

Of the States wine regions Sydney/Nepean/Hawkesbury had 39% of its visits from its local area, followed by Orange (31%). Other wine regions which relied on visits from their local area included Hilltops/Young (30%), Canberra/Sth Highlands /Snowy (30%) and New England/North West/ Northern/ Hastings (30%).

6.4.2 Origin – Elsewhere in NSW

Other intrastate visits were also important to many tourism & wine regions. Almost 60% of visits to the Hunter Region were made by those who travelled from elsewhere in NSW, the Sydney market would account for a large proportion of these visits. Over half the visits to the South Coast (53%) and the Explorer Country Regions (52%) were made by people from other areas of the State.

The wine regions which rely on visits from other areas of the State include the Lower Hunter Valley (60%), the Mudgee wine region (60%) and the Shoalhaven/South Coast (53%).

6.4.3 Origin – Victoria

Victoria was an important origin market for wineries in the Murray region, 68% of visits originating from this market, the Living Outback tourism region (43%), the South Coast (15%) and the Riverina (14%).

Wine regions which relied heavily on the Victorian market were Murray/Darling/Perricoota (55%), Shoalhaven/South Coast (15%) and Riverina/Griffith (14%).

6.4.4 Origin – Queensland

The Queensland market had greatest significance to the Big Sky tourism region (41%). The Riverina (9%) and Hunter (8%) tourism regions also received a proportion of visits from the Queensland market.

Of the wine regions, 20% of the New England/North West/ Northern/ Hastings origin market was from Queensland, while 11% of the Cowra wine region's visits were made by people from Queensland, and 10% of the Upper Hunter wine region's market.

6.4.5 Origin – Other Interstate

The Living Outback tourism region generated 18% of its origin market from other interstate markets, in particular South Australia.

The Riverina tourism region generated 10% of its visits from other interstate markets, while 9% of the Capital Country/ Southern Highlands/ Snowy combined tourism regions markets were other interstate markets, namely the ACT.

13% of visits made to the Hilltops/Young wine region were generated from other interstate markets, including the ACT. While 14% of visits to the Cowra region were made by those from other interstate markets. 11% of the Murray/Darling/Perricoota origin market were from other interstate markets.

6.4.6 Origin – Overseas

The Explorer Country (10%), Hunter (9%) and Capital Country/Southern Highlands/ Snowy (7%) tourism regions had the largest proportions of its visits from overseas origin markets.

While the Orange wine region, Mudgee and Lower Hunter Valley had 12%, 10% and 9% respectively of their visits from overseas markets.

6.5 Cellar Door Facilities

Of all respondents, 94% had a cellar door outlet on site at the vineyard, a further 6% had their own cellar door outlet off site ie. in a nearby town.

67% of wineries surveyed had a winery on site which produces wine. The presence of wine making facilities was associated with a larger number of staff and a greater annual turnover.

6.6 Availability of Food Services

Just over one third of wineries offered food services on site at their winery (37%). Wineries with over 19,000 visitors per annum were more likely to offer food services (57%).

The majority of those offering food services offered private functions (56%), BBQ/spit roast (46%), snack food, café or kiosk (38%) and gourmet picnic baskets (16%). Cheese & biscuits with wine tastings were also another popularly mentioned food service provided on site (14%).

80% of wineries in the Mid North Coast/Holiday Coast tourism region offered food services, followed by 67% of those in the South Coast and 53% in Capital Country/Southern Highlands/Snowy.

The Shoalhaven/South Coast wine region was most likely to offer food services at its wineries (67%) followed by New England/North West/ Northern/ Hastings tourism region (63%) and Canberra/Sth Highlands/Snowy (53%).

6.7 Other Visitor Facilities

Three quarters of respondents have picnic facilities at their winery, 59% host festivals or special events. Functions are catered for by 54% of wineries, with local produce sold by just over half of wineries surveyed (52%).

Almost half of the wineries surveyed (49%) have a wine club. Wine clubs are more prevalent among those wineries with a turnover of over \$400,000 (68% compared with 35% of wineries with a turnover under \$400,000). Those wineries with more than 5 staff also tend to have a wine club.

Wineries with over 19,000 visitors per annum were more likely to offer other visitor services.

6.8 Improvements to Visitor Facilities

Two thirds of wineries reported that they had made improvements to their visitor facilities in the past two years (67%). There was no differentiation between businesses with smaller and larger turnovers in this regard.

All the wineries in the Mid North Coast/Holiday Coast tourism region reported having undergone substantial improvements to their visitor facilities in the last two years. Followed by the Hunter 73%.

The Upper Hunter wine region (86%), the Hilltops/Young region (75%) and the New England/North West/Northern/Hastings (75%) wine regions were likely to have undergone substantial improvements to their visitor facilities.

6.9 Accessibility of Visitor Facilities

88% of respondents agreed that their facilities were accessible for people with disabilities. 5% said that some facilities were accessible and that some were not. While the remaining 7% reported that their facilities were not suitable for people with disabilities.

6.10 Catering for Groups

Almost all wineries surveyed (95%) could cater for independent travellers, travelling on their own. Small tour groups were catered for by 94% of wineries.

While almost three quarters or 71% of wineries were able to cater for large tour groups of more than 15. Those wineries with greater than 5 staff were in a better position to cater for large groups (78%) compared with 65% of wineries with less than five staff.

6.11 Skills in Marketing

Almost half of the respondents to the survey rated their skills in marketing their winery as a visitor experience, as very good (48%). 33% rated their skills as good, a further 15% as average and 2% as poor or very poor.

Those who rated their skills in marketing their winery as a visitor experience, as very good or good tended to have a turnover of more than \$400k.

92% of those wineries with a turnover of more than \$400k, compared with 73% of those wineries with a turnover of less than \$400k.

There was also a correlation between those with more than five employees having greater skills in marketing. 84% of respondents who rated their skills in marketing as very good or good employed more than five employees compared with 77% for those employing fewer than five staff.

6.12 Tourism Training Workshops

67% of respondents indicated that they would like to participate in further tourism training workshops, this compares with 17% of respondents who rated their marketing skills as either average, poor or very poor.

This indicates that even those who consider their marketing skills as very good or good would appreciate further training in tourism.

6.13 Average Annual Turnover

The combined turnover of wineries with cellar doors in NSW was estimated at \$93 million in 2001.

Half of all wineries with cellar doors in NSW have an annual turnover of under \$400,000.

The average turnover per winery is \$506,000. Wineries with less than 5 employees have an average annual turnover of \$317,000 compared with those businesses who have more than 5 employees who have an average annual turnover of \$746,000.

6.14 Winery Sales

Cellar door sales are the predominant form of sales. Almost half of all winery sales being generated by direct cellar door sales.

Cellar door sales are more important for smaller wineries. 57% of sales for wineries with less than 5 employees are direct cellar door sales, compared with 41% of wineries with more than 5 employees, who are less reliant on cellar door sales.

Other wine sales account for 29% of all sales, while mail order sales account for 13%. Food accounts for only 3% of all sales while accommodation accounts for just 1%.

The proportion of sales, which were cellar door sales, was greatest in the Murray tourism region (86%), Sydney (81%), Big Sky Country (73%) and the South Coast (72%).

The importance of cellar door sales was greatest in the Sydney/Nepean/Hawkesbury wine region (81%), Shoalhaven/South Coast (72%) and Orange (69%).

6.15 Importance of Cellar Door Sales

73% of wineries agreed that cellar door sales were extremely important to their business, while 18% said that cellar door sales were very important to their business.

80% of smaller businesses, (those classified with less than 5 employees and with a turnover less than \$400,000), rated cellar door sales as being extremely important, compared with 63% of larger wineries.

Most regions gave a very high rating, to the importance of cellar door sales to their total sales. All the wineries surveyed in Big Sky Country, the Murray, South Coast and Sydney tourism regions rated cellar doors as extremely important. The Riverina tourism regions was the exception with under a third (29%) rating cellar door sales as extremely important.

70% of wineries responded that cellar door sales have become "much more important" or "more important" than two years ago. This was the case for both small and larger wineries.

Most respondents in the various tourism and wine regions responded that cellar door sales had become much more important (31%) or more important (39%) in the last two year to their overall sales. 22% rated cellar door sales as the "same" as two years ago. In particular, the Riverina (43%), Big Sky Country (33%) and the South Coast (33%) tourism regions rated cellar door sales as the same as two years previously.

6.16 Mail Order and Other Wine Sales

Mail order sales were more important on average to wineries in the Riverina tourism region (19%) and wineries in the Big Sky Country region (17%).

The Living Outback region (65%), the Riverina (53%), Capital Country/Southern Highlands/ Snowy (39%) and the Hunter (34%) attributed a greater proportion of their sales to wine sales other than cellar door or mail order.

23% of sales on average were attributed to mail order sales in the Mudgee wine region. Followed by 19% in the Riverina/Griffith & Upper Hunter wine regions and 13% in the Orange wine region.

The Riverina/Griffith wine region in particular attributed over half its sales to "other wine sales" (53%), the Upper Hunter (50%), Hilltops/Young (44%) and Cowra wine region (37%).

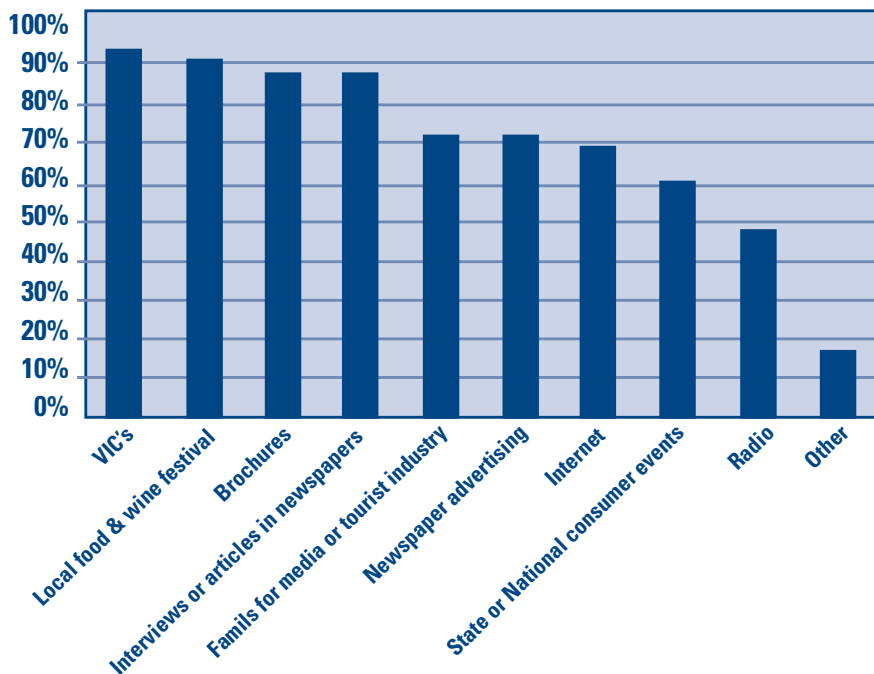
6.17 Promotional Activities

In the last two years, 82% of wineries surveyed had engaged in joint promotional activities.

Wineries in the Hunter (21%) and Riverina (21%) tourism regions were less likely to participate in joint promotional activities than other regions.

Of those promotional activities participated in, visitor information centres were most commonly used by wineries with cellar door facilities (94%), followed by local food & wine festivals (91%), brochures (88%) and interviews or articles in newspapers (86%).

Figure 1 Joint Promotional Activities in the Last Two Years



Familiarisation tours (72%), newspaper advertising (71%), internet (69%), State & national consumer events (59%) and radio (47%) were also common joint promotional activities participated in by wineries in the last two years.

6.18 Which Promotional Activities were most Successful?

Based on the opinions of individual operators, the most successful promotional activities in attracting extra patronage were Visitor Information Centres (VIC's) (24%), local food and wine festivals (18%) and brochures (12%).

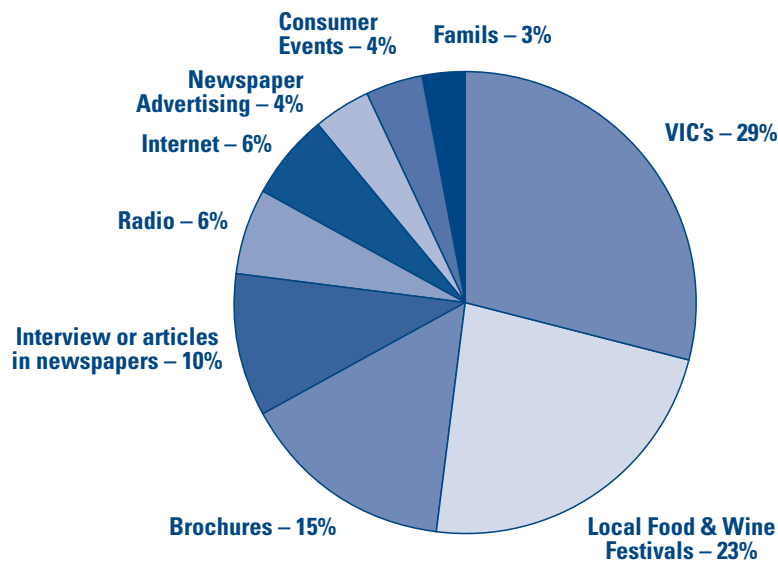
Promotions through VIC's were more successful among smaller wineries, ie. 28% of wineries with less than 5 employees rated VIC's as their most successful promotional activity compared with 19% of those wineries with more than 5 employees.

In addition, 22% of those wineries with an annual turnover of under \$400k rated VIC's as the most successful, compared with 18% of wineries with turnovers greater than \$400k.

Larger wineries tended to rate local food and wine festivals as having greater impact on visitation 27% compared with those wineries with fewer than 5 employees (16%).



Figure 2 Promotional Activities attracting extra patronage



6.19 Visits to Wineries with Cellar Doors

60% of wineries collect data about the origin of people who visit their wineries. With smaller wineries having a slightly greater tendency to collect origin details, 62% versus 58% for larger wineries.

Over the last five years almost 70% of wineries reported having noticed increases in the number of visits made to their wineries. Wineries with turnovers above \$400k had noticed a greater increase in visits (77%) compared with those wineries with annual turnovers below \$400k (66%). Similarly, those wineries with more than 5 employees were more likely to have experienced increases in visits over the last 5 years.

80% of those respondents who reported noticing an increase in visits over the last five years, noticed the largest increase in visits in 2001. Just over half (53%) noticed an increase in visits in 2000, 30% reported an increase in 1999 while 22% noticed an increase in 1998 and 17% reported an increase occurred in 1997.

Table 1 Years in which operators noticed any increases or decreases in visits

	% who noticed increases in visits (n=150)	% who noticed decreases in visits (n=48)
1997	17%	2%
1998	22%	4%
1999	30%	12%
2000	53%	34%
2001	80%	76%

72% of wineries did not notice any decrease in visits to their wineries in the last five years. Of the 22% of wineries which did notice a decrease, most experienced their greatest drop in visits in 2001 (76%) and 34% noticed a drop in 2000, 12% in 1999.

Most tourism regions experienced increases in the numbers of visits in the last 5 years, with the exception of Big Sky Country in which an average of 67% of wineries did not notice an increase in visits. 43% of wineries in the Riverina reported not having experienced any increases in visits to their wineries over the last 5 years.

6.19.1 Visits to wineries with cellar doors in NSW tourism regions

The Hunter tourism region has the largest number of wineries (93) and generates the greatest number of visits, totalling an estimated 3 million visits annually or 71% of all visits to the State.

The Explorer Country tourism region has the next largest number of wineries (55) with annual visits to the region's wineries totalling 428,000, representing 10% of winery visits to the State.

The Sydney tourism region generates the next largest number of visits (292,000) from the 7 wineries included in the area, accounting for 7% of visits to the State.

Table 2 Estimated Visits to Wineries with Cellar Doors in NSW Tourism Regions

Tourism Regions	Wineries (weighted)	Estimated Visitation 2001
Hunter	93	2,975,403
Explorer Country	55	427,986
Capital Country/Southern Highlands/Snowy	24	69,868
Riverina	15	84,596
South Coast	8	174,393
Sydney	7	292,118
Big Sky Country	5	25,600
Mid North Coast/ Holiday Coast	5	52,516
The Living Outback	3	6,210
The Murray	2	29,390

6.19.2 Visits to Wineries with Cellar Doors in NSW Wine Regions

The Lower Hunter Valley wine region has the largest number of wineries (71) and generates the greatest number of visits, totalling an estimated 3 million visits annually or 71% of all visits to the State. The Mudgee wine region has the next largest number of wineries (28) with annual visits to the region's wineries of 368,000, representing 9% of winery visits to the State. The Sydney/Nepean/Hawkesbury wine region generates the next largest number of visits (292,000) by the 7 wineries included in the area, accounting for 7% of winery visits to the State.

Table 3 Estimated Visits to Wineries with Cellar Doors in NSW Wine Regions

Wine Region	Wineries (weighted)	Estimated Visits 2001
Lower Hunter Valley	71	2,901,512
Mudgee	28	368,096
Upper Hunter	22	53,253
Canberra/Sth Highlands/Snowy	20	50,932
Orange	19	19,767
Riverina/Griffith	15	84,596
New England/North West/ Northern/Hastings	10	84,846
Cowra	9	11,925
Shoalhaven/South Coast	8	174,393
Sydney/Nepean/Hawkesbury	7	292,118
Murray/Darling/Perricoota	4	35,600
Hilltops/Young	4	17,115

Important Note: In order to analyse the survey data at a regional level, and to ensure a reasonable sample base, it was necessary to group a number of wine growing areas together. Some wine growing areas contained insufficient wineries with cellar doors at the time the survey was conducted to warrant separate wine growing regions.

For the purposes of this study, the Orange Wine Region included Wellington and Bathurst. The Canberra/Southern Highlands/Snowy Wine Region, included Tumbarumba.

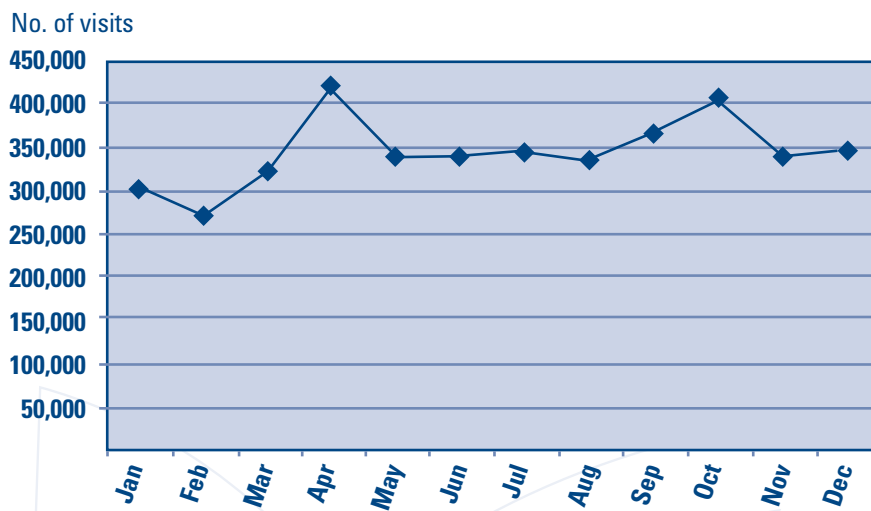
Since the survey was conducted in January 2002, a number of new wineries have opened, with some areas expanding and new designated wine regions emerging. These variations will be reflected in subsequent surveys.

6.20 Seasonality

Based on records kept by individual operators, the most popular months for visits were April (10%), October (10%), September (9%) and December (8%). These peaks coincide with Easter and other holiday periods.

Those wineries with fewer than 5 staff and with a turnover under \$400k, had significantly fewer visits per month on average than larger wineries.

Figure 3 Average Visits per month to Wineries in NSW with Cellar Doors



7. Appendices

7.1 Attachment 1: Letter sent to Respondents

Dear Sir or Madam:

Tourism New South Wales and the NSW Wine Industry Association are conducting a telephone survey about Wine Tourism in New South Wales. All wineries in New South Wales with cellar door facilities will be contacted by a market research agency on our behalf in early January 2002. Your responses will assist in planning and marketing efforts on behalf of all the wine regions of NSW.

In one of the questions you will be asked to estimate the number of visits to your winery, each month for the past 12 months January – December 2001. The results from this question will help in identifying peak and non peak periods and determining visitor trends.

We would like to ask you to give some thought to these estimates in advance of being **contacted between 9th and 15th January 2002**.

You could look at your visitor books to estimate the number of visits each month, or calculate estimates based on the amount of wine sold at the cellar door, or you may already use some other method for estimating the number of visits to you winery.

The question will read;

Could you estimate the number of visits to your winery for each month over the past year?

January 2001 _____

February 2001 _____

March 2001 _____

April 2001 _____

May 2001 _____

June 2001 _____

July 2001 _____

August 2001 _____

September 2001 _____

October 2001 _____

November 2001 _____

December 2001 _____

We understand you are heading into an important period with "vintage" approaching, however, your response to the survey and this question in particular are critical to measuring the importance of cellar door operations to the wine industry in New South Wales. A copy of the research findings will be supplied to you upon completion of the research study.

If you have any questions in regards to the survey, please contact Suzanne Clark, Research Coordinator Ph 9931 1445.

Yours sincerely

Colin Bransgrove
Director, Industry Development



7.2 Attachment 2: Regional sample sizes

Tourism Region	No. of Respondents	Weighted No. of Respondents	Wine Region	No. of Respondents	Weighted No. of Respondents
Hunter	62	93	Lower Hunter Valley	48	71
Explorer Country	40	55	Mudgee	22	28
Capital Country/ Southern Highlands/ Snowy	19	24	Canberra/ Sth Highlands/ Snowy	12	20
Riverina	14	15	Riverina/Griffith	14	15
South Coast	6	8	Upper Hunter	14	22
Mid North Coast/ Holiday Coast	5	5	Orange	11	19
Big Sky Country	3	5	New England/ North West/ Northern/ Hastings	8	10
The Murray	2	2	Shoalhaven/ South Coast	6	8
The Living Outback	3	3	Cowra	8	9
Sydney	3	7	Murray/ Darling/ Perricoota	4	4
			Hilltops/Young	4	4
			Sydney/Nepean/ Hawkesbury	3	7

Note: For further information about the Local Government Areas which comprise the Tourism Regions please refer to the following report on this website.

New South Wales Tourism Profile.

This report provides a complete list of Tourism Regions and their corresponding Local Government Areas.