

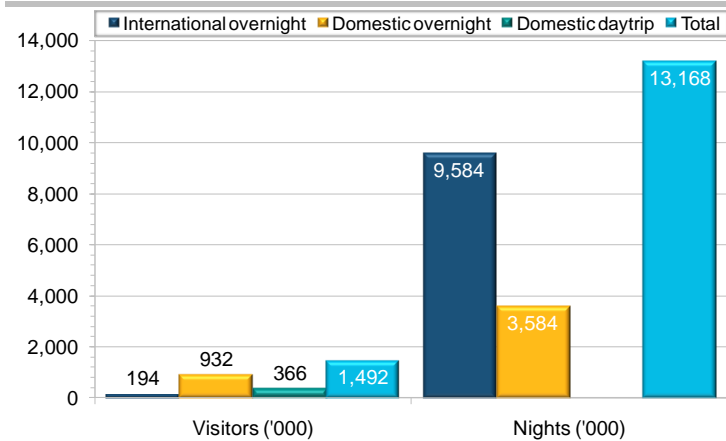


Wine Tourism

Definition

A winery visitor is defined as an international or domestic traveller who has visited at least one winery during their trip in Australia.

Overview



NSW received almost 1.5 million international⁽¹⁾ and domestic⁽²⁾ wine visitors. Visitors spent nearly 13.2 million nights in the State.

Wine visitors to NSW spent \$2.4 billion (excl package tours and prepaid international airfares by overseas visitors) during their trip in Australia.

⁽¹⁾ Source: International Visitor Survey, YE Dec 09, Tourism Research Australia

⁽²⁾ Source: National Visitor Survey, YE Dec 09, Tourism Research Australia

Domestic Market⁽²⁾

The information in this section relates to domestic visitors who have visited a winery in NSW.

Visitors and nights

NSW received 932,000 domestic overnight wine visitors. They spent nearly 3.6 million nights in the State.

Market share

Overnight wine travellers represented 4.1% of visitors and 4.7% of nights by domestic travellers to NSW. The State received 26.9% of visitors and 18.1% of nights by wine travellers in Australia.

Expenditure

Domestic overnight wine visitors to NSW spent \$828 million (incl airfares and transport costs) during their trip.

On average, wine visitors spent \$889 per visitor and \$231 per night in the State.

Average stay

Domestic wine visitors stayed, on average, 3.8 nights in NSW. This was longer than the average for all visitors to the State (3.4 nights).

Interstate wine visitors to NSW stayed 2.4 nights longer than intrastate visitors (5.8 vs 3.4 nights).

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	261	28.0%	1,032	28.8%	4.0
Sydney	488	52.4%	1,484	41.4%	3.0
Intrastate	749	80.4%	2,516	70.2%	3.4
Victoria	69	7.4%	501	14.0%	7.3
Queensland	73	7.8%	-	-	-
Other interstate	41	4.4%	567	15.8%	13.8
Total Interstate	183	19.6%	1,069	29.8%	5.8
Total	932	100.0%	3,584		3.8

- = estimate considered statistically unreliable

NSW received 80.4% of overnight wine **visitors** from intrastate and 19.6% from interstate. Sydney (52.4%) was the biggest source market. Queensland (7.8%) was the biggest interstate market, while Victoria (7.4%) the 2nd biggest.

Intrastate contributed 70.2% of wine visitor **nights** in the State, while interstate contributed 29.8%. Sydney (41.4%) was the biggest source market. Victoria (14.0%) was the biggest interstate market.

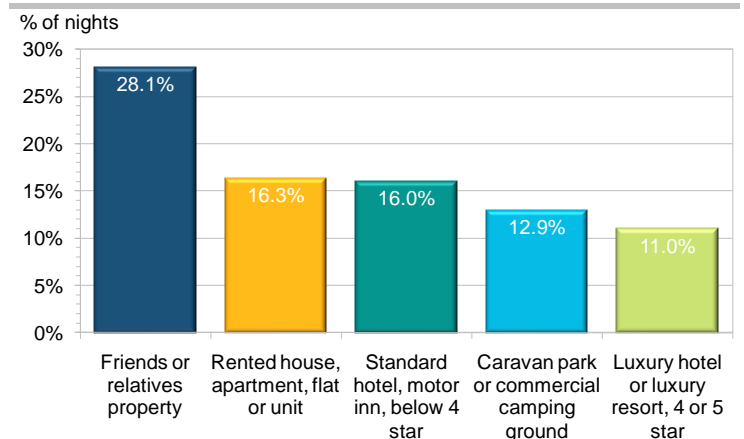
Seasonality

NSW received the most domestic overnight wine visitors during the June quarter (26.3%) and the least in the March quarter (23.4%). Wine visitors spent the most nights in NSW during the December quarter (28.5%) and the least in the September quarter (19.2%).

Transport

'Private or company vehicle' (85.7%) was the most common transport used to destinations in NSW by domestic overnight wine visitors. 'Air transport' (6.0%) was the 2nd most common transport used, followed by 'bus or coach' (4.4%).

Accommodation



'Friends or relatives property' (28.1%) was the most popular accommodation type used for domestic wine visitor nights in NSW. 'Rented house, apartment, flat or unit' (16.3%) was the 2nd most popular accommodation type used, followed by 'standard hotel, motor inn, below 4 star' (16.0%) and 'caravan park or commercial camping ground' (12.9%).



Domestic Market continued

Activity at wineries

Activity at wineries	Visitors	
	('000)	%
Wine tasting	710	76.2%
Purchase wine to take away	624	67.0%
Sample produce at the winery	349	37.4%
Eat / drink at restaurant / café	300	32.2%
Purchase produce at the winery	239	25.6%
Guided tour of the winery	104	11.2%
Attend private function	74	7.9%
Attend public event	-	-
Undertake or watch a live cooking class or demonstration	-	-
Educational wine course	-	-

- = estimate considered statistically unreliable

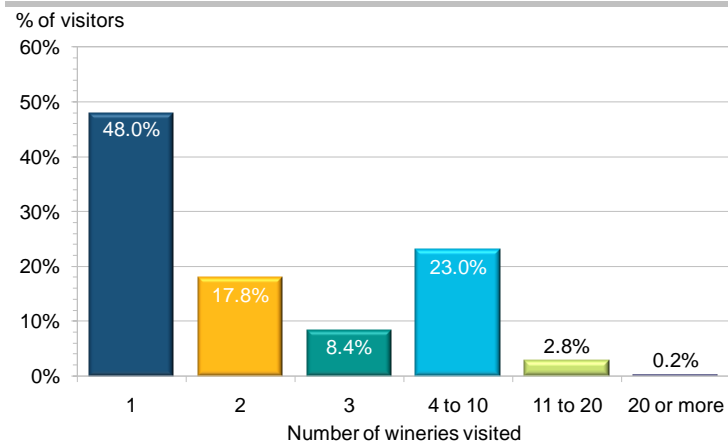
'Wine tasting' (76.2%) was the most popular activity undertaken at wineries by domestic overnight wine visitors to NSW. 'Purchase wine to take away' (67.0%) was the 2nd most popular activity, followed by 'sample produce at the winery' (37.4%).

Wine regions in NSW

'Hunter Valley' (49.2%) was by far the most visited wine region in NSW by domestic overnight wine visitors. 'Mudgee' (7.6%) was the 2nd most visited wine region.

'Hunter Valley' (41.9%) received by far the most **nights** spent by domestic wine visitors in NSW.

Number of wineries visited



Nearly ½ (48.0%) of domestic overnight wine visitors had visited 'one winery' in NSW, while 23.0% had visited 'four to ten wineries'.

Approximately 3.0% of domestic overnight wine visitors had been to '11 or more wineries' in the State.

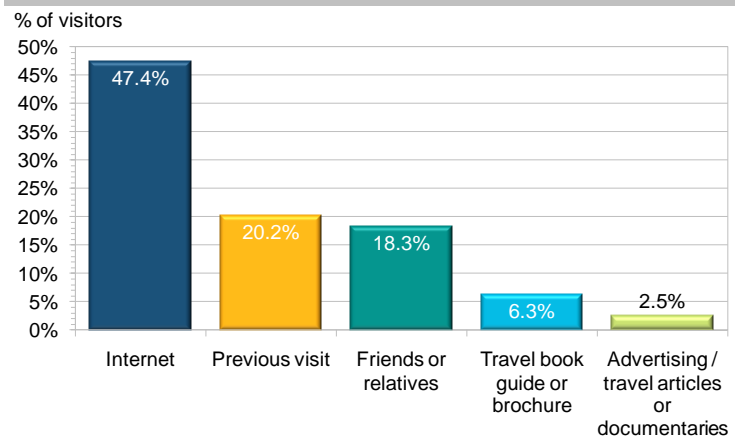
Food at wineries

Nearly 1/3 (32.1%) of domestic overnight wine visitors to NSW purchased or consumed food or drink at the winery. A 'mid-priced restaurant' (53.2%) was the most popular eatery, followed by 'cafe / coffee shop' (34.4%).

Amount spent on wine at winery

Nearly 2/3 (64.9%) of domestic overnight wine visitors to NSW bought wine to take away from the winery. '\$21 to \$50' (26.0%) was the most common expenditure range. Nearly ¼ (22.5%) spent more than \$250.

Information sources



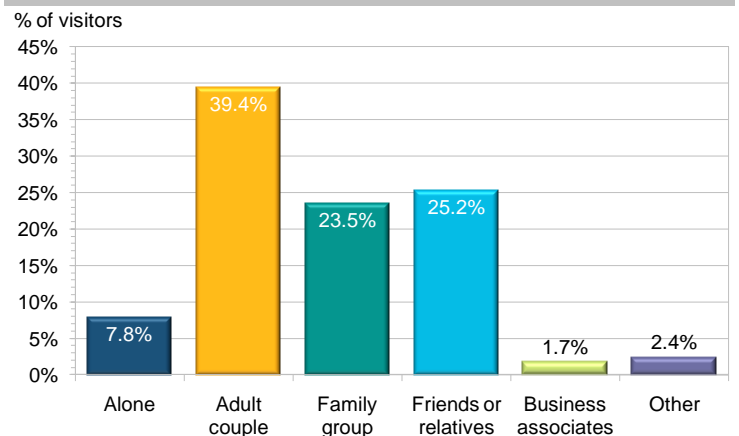
The 'internet' (47.4%) was the most popular information source for the trip in Australia by domestic overnight wine visitors to NSW. 'Previous visit' (20.2%) was the 2nd most popular information source, followed by 'friends or relatives' (18.3%).

Of the domestic overnight wine visitors to NSW who had used the internet for this trip in Australia, over 2/3 (69.0%) had booked at least part of the trip on the internet.

Age

Aged '35-44 years' (21.5%) was the biggest age group of domestic overnight wine visitors to NSW. '45-54 years' and '55-64 years' (19.2% each) were the 2nd biggest age groups.

Travel party



'Adult couple' (39.4%) was the biggest travel party of domestic overnight wine visitors to NSW. 'Friends or relatives' (25.2%) was the 2nd biggest travel party, followed by 'family group' (23.5%).

Daytrips

NSW received 366,000 domestic daytrip wine visitors. They represented 0.8% of domestic daytrip visitors to NSW. The State received 19.7% of wine day-trippers in Australia.

Expenditure on daytrips

Domestic daytrip wine visitors to NSW spent \$54 million during their trip. On average, they spent \$147 per trip in the State.

Age of daytrip visitors

Aged '45-54 years' (26.2%) was the biggest age group of domestic daytrip wine visitors to NSW. '55-64 years' (20.5%) was the 2nd biggest age group, followed by '25-34 years' (16.9%).

Food & Wine Tourism to NSW

Year ended December 2009



International Market⁽¹⁾

The information in this section relates to international overnight visitors who have visited a winery in NSW.

Visitors and nights

NSW received 194,000 international wine visitors. They spent nearly 9.6 million nights in the State.

Market share

Wine travellers represented 7.4% of visitors and 16.2% of nights by international travellers to NSW. The State received 26.8% of visitors and 24.1% of nights by wine travellers in Australia.

Expenditure⁽³⁾

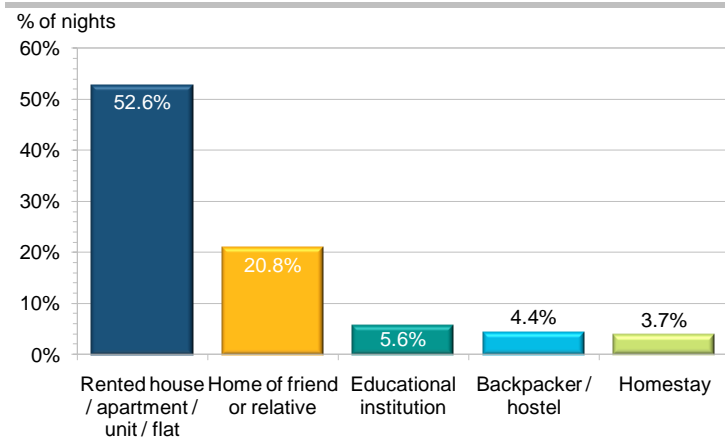
International wine travellers to NSW spent \$1.6 billion (excl package expenditure) during their trip to Australia. On average, visitors spent \$8,044 per visitor and \$163 per night.

⁽³⁾ Excluding package tours and prepaid international airfares.

Average stay

International wine visitors stayed an average of 49.4 nights in NSW. This was substantially longer than the average for all visitors to the State (22.6 nights).

Accommodation



'Rented house / apartment / unit / flat' (52.6%) was the most popular accommodation type used for international wine nights in NSW. 'Home of a friend or relative' (20.8%) was the 2nd most popular accommodation type used, followed by 'educational institution' (5.6%).

Transport

'Private or company car' (39.9%) was the most common transport used to destinations in NSW by international wine visitors. 'Aircraft' (29.4%) was the 2nd most common, followed by 'taxi or chauffeur driven hire car' (17.4%).

Return visitors

Nearly ½ (45.9%) of international wine visitors to NSW were on a return visit to Australia. This was a lower percentage than for all visitors to the State (52.0%).

Group tours

The rate of group tour travel to Australia amongst international wine visitors who had been to NSW was 10.7%.

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Korea	27	13.9%	1,608	16.8%	59.6
China	14	7.2%	1,212	12.6%	87.2
Other Asian markets (4)	45	23.1%	2,439	25.4%	54.5
USA	23	11.9%	698	7.3%	30.2
United Kingdom	36	18.6%	1,228	12.8%	34.0
Other European markets (5)	27	13.7%	1,427	14.9%	53.6
All other countries	23	11.6%	973	10.2%	43.2
Total	194		9,584		49.4

Other Asian markets⁽⁴⁾ (23.1%) was the largest source of international wine visitors to NSW. United Kingdom (18.6%) was the 2nd largest source, followed by Korea (13.9%).

Other Asian markets⁽⁴⁾ (25.4%) was the biggest contributor of nights in the State. Korea (16.8%) was the 2nd biggest contributor, followed by other European markets⁽⁵⁾ (14.9%).

⁽⁴⁾ All Asian markets, excluding Korea and China.

⁽⁵⁾ All European markets, excluding United Kingdom.

Package tours

Almost 1/5 (19.3%) of international wine visitors to NSW, arrived in Australia on a travel package. 'All accommodation' (82.0%) was the most popular travel arrangement included in the package (other than 'international airfares').

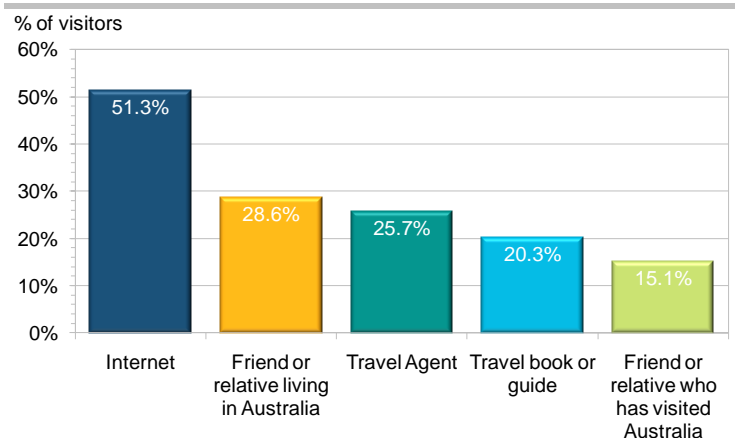
Travel party

'Alone' (54.4%) was the most popular travel party of international wine visitors to NSW. 'Adult couple' (29.7%) was the 2nd most popular travel party, followed by 'friends and relatives' (7.5%) and 'family group' (7.1%).

Age

Aged '25-34 years' (28.5%) was the biggest age group of international wine visitors to NSW. '15-24 years' (19.7%) was the 2nd biggest age group, followed by '55-64 years' (16.3%).

Information sources



The 'internet' (51.3%) was the most popular information source for the trip to Australia by wine visitors who had been to NSW. 'Friend or relative living in Australia' (28.6%) was the 2nd most popular information source, followed by 'travel agent' (25.7%).

Of those international wine visitors to NSW, who had used the internet for this visit to Australia, over ½ (51.3%) had booked at least part of the trip on the internet.



International Market (continued)

Activity at wineries

Activity at wineries	Visitors	
	('000)	%
Wine tasting	173	89.2%
Purchase wine to take away	92	47.6%
Sample produce at the winery	53	27.1%
Eat / drink at restaurant / café	47	24.2%
Guided tour of the winery	46	23.6%
Purchase produce at the winery	27	13.8%
Attend private function	-	-
Undertake or watch a live cooking class or demonstration	-	-
Educational wine course	-	-
Attend public event	-	-

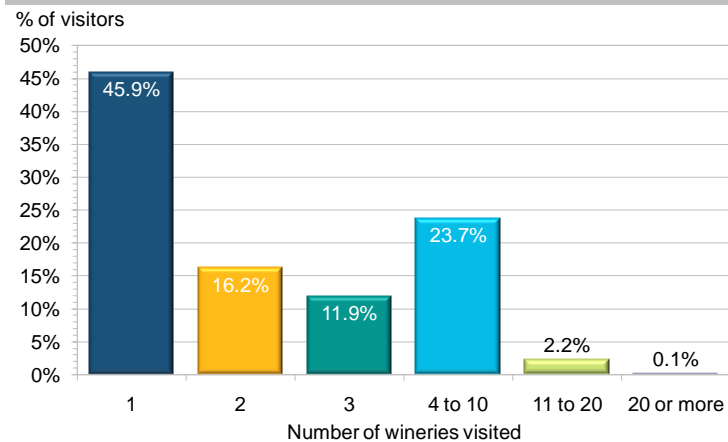
- = estimate considered statistically unreliable

'Wine tasting' (89.2%) was the most popular activity undertaken at wineries by international wine visitors to NSW. 'Purchase wine to take away' (47.6%) was the 2nd most popular activity, followed by 'sample produce at the winery' (27.1%).

Wine regions in NSW

'Hunter Valley' was by far the most visited wine region in NSW by international wine travellers (76.2% of visitors and 80.5% of nights).

Number of wineries visited



Nearly ½ (45.9%) of international wine visitors had visited 'one winery' in NSW, while 23.7% had visited 'four to ten wineries'.

Approximately one in forty (2.3%) of visitors had been to '11 or more wineries' in NSW.

Food at wineries

Almost ¼ (24.2%) of international wine visitors to NSW purchased or consumed food or drink at the winery. A 'mid-priced restaurant' (52.3%) was the most popular eatery, followed by 'cafe / coffee shop' (45.2%).

Amount spent on wine at winery

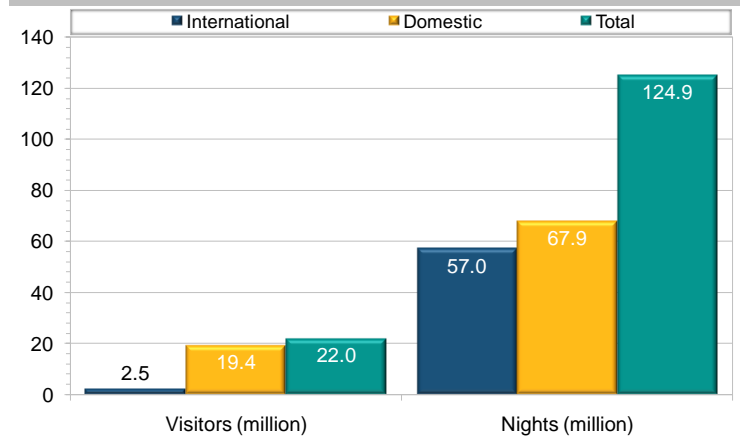
Nearly ½ (46.9%) of international wine visitors to NSW bought wine to take away from the winery. '\$21 to \$50' (31.8%) was the most common expenditure range. One in eight (12.5%) spent more than \$250.

Food Tourism

Definition

A food visitor is defined as an international or domestic traveller who has eaten at a commercial food establishment during their trip in Australia.

Visitors and nights



NSW received nearly 22.0 million international⁽¹⁾ and domestic⁽²⁾ food visitors, who spent over 124.9 million nights in the State.

International food travellers represented 97.2% of international visitors and 96.4% of nights in NSW. The State received 52.0% of visitors and 34.4% of nights by international food travellers in Australia.

Domestic food travellers represented 85.8% of domestic visitors and 88.2% of nights in NSW. The State received 35.0% of visitors and 30.2% of nights by domestic food travellers.

⁽¹⁾ Source: International Visitor Survey, YE Dec 09, Tourism Research Australia

⁽²⁾ Source: National Visitor Survey, YE Dec 09, Tourism Research Australia

Commercial food establishment

Commercial food establishment	International visitors %	Domestic visitors %
Takeaway / fast food / snack bar	65.4%	49.3%
Pub / bar and grill	48.3%	43.5%
Café / coffee shop	66.2%	49.8%
Mid-priced restaurant	70.3%	41.1%
Expensive restaurant	24.2%	11.6%
Other eatery	5.5%	4.2%
Visitors to NSW	97.2%	85.8%

'Mid-priced restaurant' (70.3%) was the most popular commercial food establishment used by **international** food visitors to NSW.

'Café / coffee shop' (49.8%) was the most popular commercial food establishment used by **domestic** food visitors to NSW.

Image reference

Photographs (in order of appearance on each page): A winery in Mudgee, Mike Newling; Wollondilly Farmgate, Tourism Wollondilly; Sydney Harbour dining, Hamilton Lund; The Loft at King Street Wharf, Pierre Toussaint.