

Tasmanian Cellar Door Customer Survey 2007: analysis of results

Better understanding the motivations, expectations and decision-making behaviour of Tasmania's winery/cellar door customers



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Disclaimer

Any information quoted from this report should acknowledge Tourism Tasmania's ***Tasmanian Cellar Door Customer Survey 2007: analysis of results*** as its source.

Readers are advised to exercise caution when interpreting figures contained in this report. Information contained in this report is based upon a sample of 737 respondents, the majority of which visited 8 wineries/cellar doors across Tasmania over a continuous four week period during January and February 2007. 68% of completed surveys were fully useable. Resultant data should be used as a guideline only.

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Background

Research indicates the food and beverage attribute is central to the Tasmanian Tourism Brand, following nature and cultural heritage in strength of appeal to visitors. Food and beverage tourism, both in terms of supply and demand, has changed significantly in Tasmania over recent years, with, for example, 54 cellar door outlets and 244 vineyards established by 2005, increasing from 36 cellar doors and 119 vineyards in 1999¹. Food and beverage tourism is now an established component of Tourism Tasmania's marketing for the State, paralleling the increase in supply of food and beverage based tourism businesses over the past few years.

However, anecdotal evidence from the Tasmanian wine industry suggests a recent shift in the type and expenditure patterns of visitors to some cellar doors/wineries. A number of cellar doors are experiencing a downturn in visitor numbers and spend, partly influenced by retail consolidation and wine supply chain changes, affecting consumer-purchasing behaviour. This is within a context of increased competition for wine sales Australia-wide due to a national wine surplus².

Tourism Tasmania and Tasmania's new peak industry body, the Wine Industry of Tasmania, together with the two wine route groups Wine South Tasmania and the Tamar Valley Wine Route, recognised a strategic need to collect data to assist in better understanding cellar door/winery visitors in Tasmania. The following pilot report is the product of this partnership research.

Tourism Tasmania's strategic approach for the next three years, *New Directions for Our Island*, seeks to increase Tasmania's share of the tourism market. In addition, both industry and government need to better understand changing market trends and their implications for industry development, product development and business sustainability. The results of this pilot survey will assist in achieving these goals.

The research will also support the tourism jobs and visitor expenditure goals of *Tourism 21*, the joint industry and State Government ten year strategic plan (<http://www.tourismtasmania.com.au/tasind/tourism21/index.html>). Information such as cellar door visitor motivations, preferred experiences, expectations, and pre and post-arrival planning and information seeking is critical in assisting both Tourism Tasmania and the wine tourism sub-sector better meet and grow consumer demand, thus increasing job growth and consumer expenditure.

Research aims

The primary aim of this research is to gain insight into the motivations, expectations and information-seeking behaviours of visitors, including local Tasmanians, to cellar doors and wineries in Tasmania. The research will provide benchmark data, previously unavailable, including:

- Visitor demographics
- Planning and information-seeking behaviour, both pre and post arrival in Tasmania
- Customer triggers and motivations to visit cellar doors
- Behaviours at cellar door, including purchase behaviour & barriers to purchase

1 Wine Industry Fact Sheets 2005 and 1999, DPIW, Hobart, Tasmania.

2 *Winescope*, Summer 2006/07, Winemakers' Federation of Australia, Adelaide, South Australia.

In addition, the research aims to:

- Begin to investigate the intrastate wine tourism market
- Produce a pilot research tool that can be replicated and refined for future use, either by industry, government or both in partnership
- Build on the visitor data gathered during the Southern Vineyards Open Weekend 2005, and explore areas that may warrant further investigation

Survey Information

- Research methodology consisted of a survey comprising 24 questions, both open and closed-ended (Appendix 1). As far as practicable, survey design complemented the Tasmanian Visitor Survey
- Survey forms were placed at four cellar doors each in the Wine South Tasmania sub-region and Tamar Valley Wine Route, and at one cellar door each in the North West Coast and the Freycinet sub-regions. Visitors to these cellar doors self-selected whether to complete a survey form, while visiting the cellar door throughout the data collection period
- Survey questions were developed by Tourism Tasmania, in conjunction with Tasmanian cellar doors/wineries. ERS Consultancies, Hobart, assisted with finalisation of the survey design
- Frequency and duration: surveys were available for completion by visitors to selected cellar doors throughout Tasmania, during their scheduled opening hours, for a continuous period of four weeks during January and February 2007
- An incentive of winning one of several cases of Tasmanian wine was provided to encourage survey completion. Cellar door staff also discreetly encouraged completion of surveys, although the level of this presumably varied depending upon staff time constraints
- Completed survey forms were delivered to ERS Consultancies, Hobart, for data entry and provision of data tables

Survey Sites and Sample Frame

- The sample population was all customers to ten cellar doors/wineries across Tasmania: four cellar doors within each of Tasmania's two wine routes (Tamar Valley and Wine South Tasmania), plus one cellar door each from the North West Coast and Freycinet region. Cellar door sampling was representative, with cellar doors selected to participate in the Survey based upon diversity of geographic location, business size (from very small to Tasmania's larger winery cellar doors), volume of visitor numbers, willingness to participate, proximity to main touring routes (relatively remote to immediately adjacent) and availability of complementary cellar door attractions such as art galleries, other product ranges, dining facilities, etc.
- The sample frame was all cellar door visitors, aged 18 years or over, who self-selected to complete the survey, while visiting the cellar door during the data collection period

Sample size

- A total of 1020 surveys were distributed to participating cellar doors across Tasmania, 100 surveys each to 9 cellar doors, and 110 surveys to one cellar door

- A total of 737 respondents completed the survey, of which approximately 68% of surveys were fully useable. Of the remaining partially completed surveys, data was entered against completed questions as most partially completed surveys were over 80% complete
- Of the ten participating cellar doors, two provided only 2% and 1% respectively of total number of completed surveys (one cellar door each from the Tamar Valley Wine Route, and Wine South Tasmania), thus the statewide representativeness of participating cellar doors was only minimally affected. Of the 97% of responses contributed by visitors to 8 cellar doors across Tasmania, respondent weightings varied between 7% and 16% per cellar door, with an average completed survey contribution of 12.5% from each cellar door.
- Of the 737 total survey respondents, weighting of absolute response numbers varied between the four sub-regions. The Wine South Tasmania sub-region contributed 41% of responses, Freycinet sub-region 12%, Tamar Valley Wine Route 36% and north west coast 11%. This meant sub-regions contributed a proportionately even number of completed surveys per number of wineries participating in each sub-region, with 3 wineries/cellar doors primarily participating from the Wine South Tasmania sub-region, 1 from Freycinet, 3 from the Tamar Valley and 1 from the north west coast.
- Of the 97% of responses contributed by 8 cellar doors/wineries, 6 of other cellar doors provided total weekly visitor counts for the duration of survey completion. During the four week data collection period these 6 cellar doors received a total of 4032 visitors, of which 13% completed a cellar door survey.

Question design, pre-testing and privacy issues

Survey questions were designed and pre-tested by Tourism Tasmania and ERS Consultancies at a cellar door in the Wine South Tasmania sub-region, with subsequent question refinements made. Survey forms clearly stated all information received was strictly confidential.

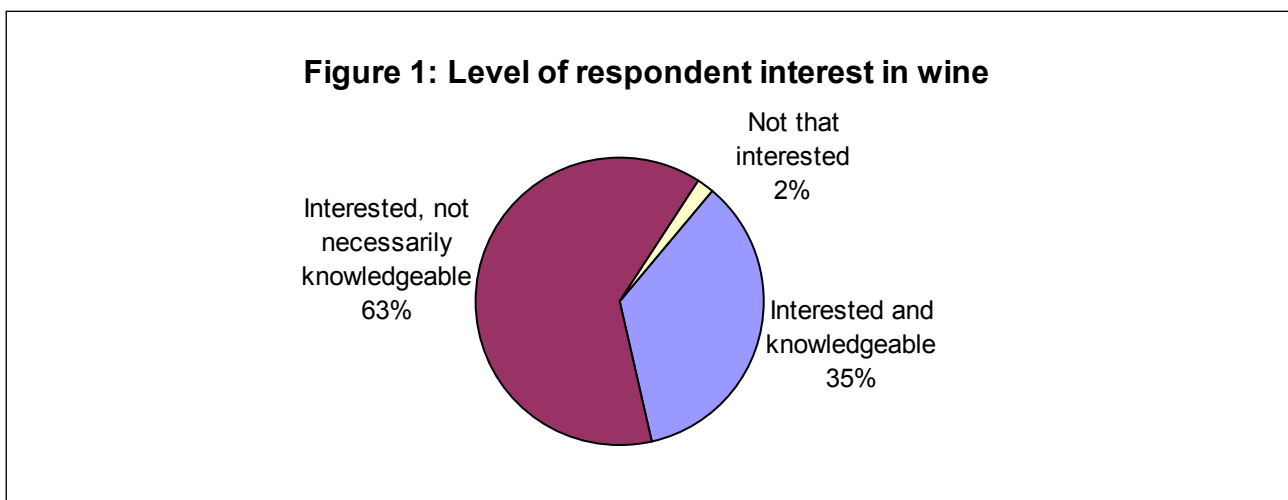
Summary of results

As the survey questions differed according to the origin of the respondent (whether intrastate or interstate/international), results are summarised in three main sections: data relating to **all respondents**, data relating to **interstate/international respondents only** and data relating to **Tasmanian respondents only**. This means data is not grouped accordingly to survey question chronology. The total number of valid responses to each question differed, so to ensure data is interpreted correctly the total number of valid responses received is identified against each question below. Percentages were calculated from the number of valid responses to each question, not the total number of survey forms completed.

Data relating to all respondents

Q1. Level of interest in wine (n=734)

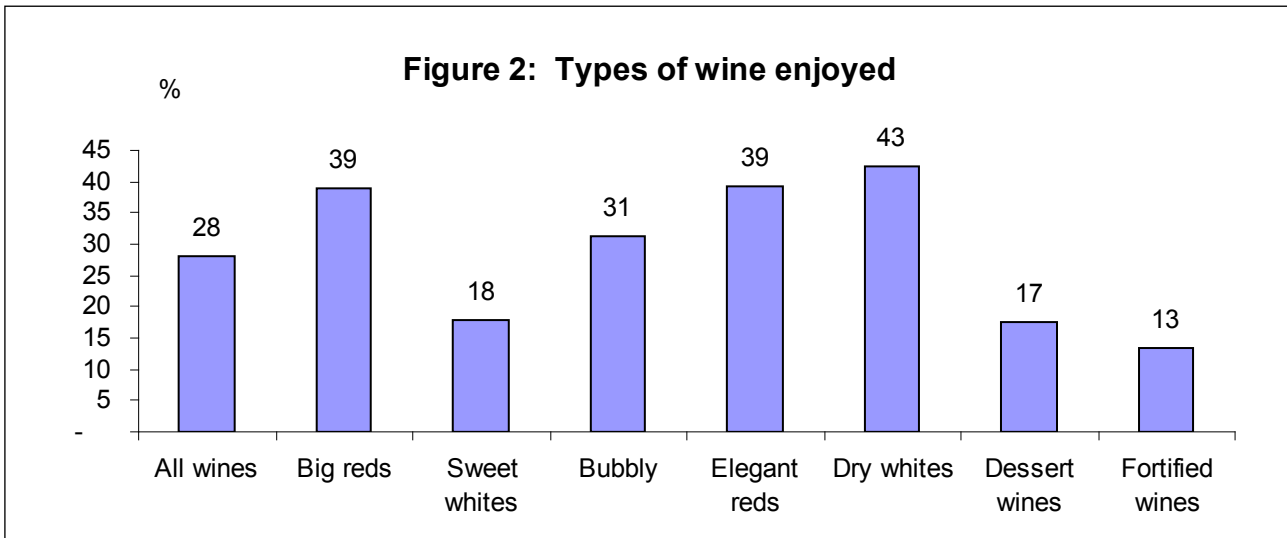
As indicated in Figure 1, the majority of respondents (63%) were interested in wine, but did not necessarily consider themselves wine knowledgeable. 35% of respondents indicated they were both interested and knowledgeable, while 2% of respondents were not that interested in wine.



Q2. Types of wine enjoyed

The aim of question 2 was to identify the types of wine enjoyed by visitors to Tasmanian cellar doors/wineries, and to investigate whether respondents' wine preferences to some degree matched the types and varieties of wine best suited to and produced by Tasmania's cool climate.

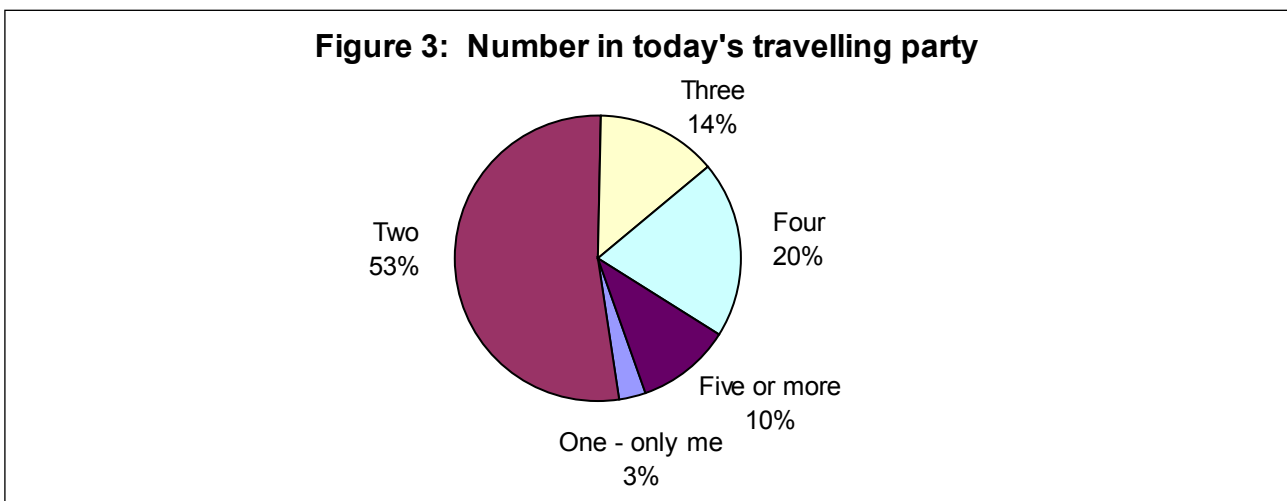
As indicated in Figure 2, respondent wine preferences were diverse, with the highest preferences being for dry whites (43%) and elegant reds (39%), two of Tasmania's most important wine categories, and big reds (39%), a category of wine of somewhat lesser importance to Tasmanian wine producers. Sparkling wine (31%) and 'all wines' also received high preference rankings from respondents.



NB. Total respondent number unable to be provided as respondents could tick more than one response option. This also means that responses total more than 100%.

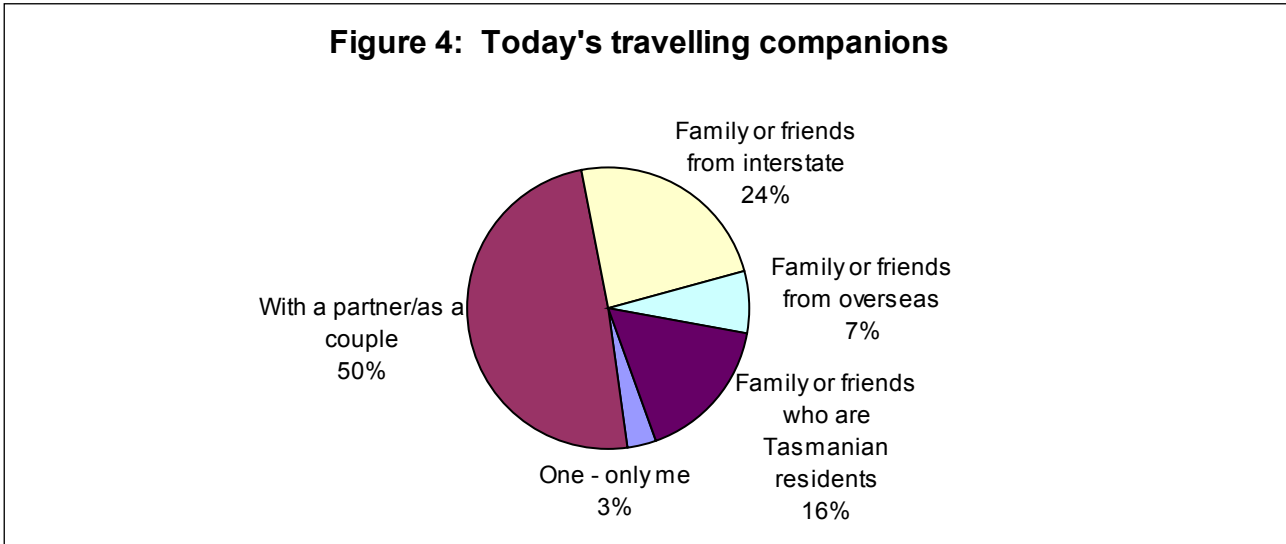
Q3. Number in today's travelling party (n=734)

As indicated in Figure 3, below, by far the most important travel party size was two, comprising 53% of survey respondents. Groups of 3 or 4 people travelling together were also important, comprising 14% and 20% of respondents respectively. Respondents travelling alone comprised a small number of survey respondents at 3%.



Q4. Today's travelling companions (n=724)

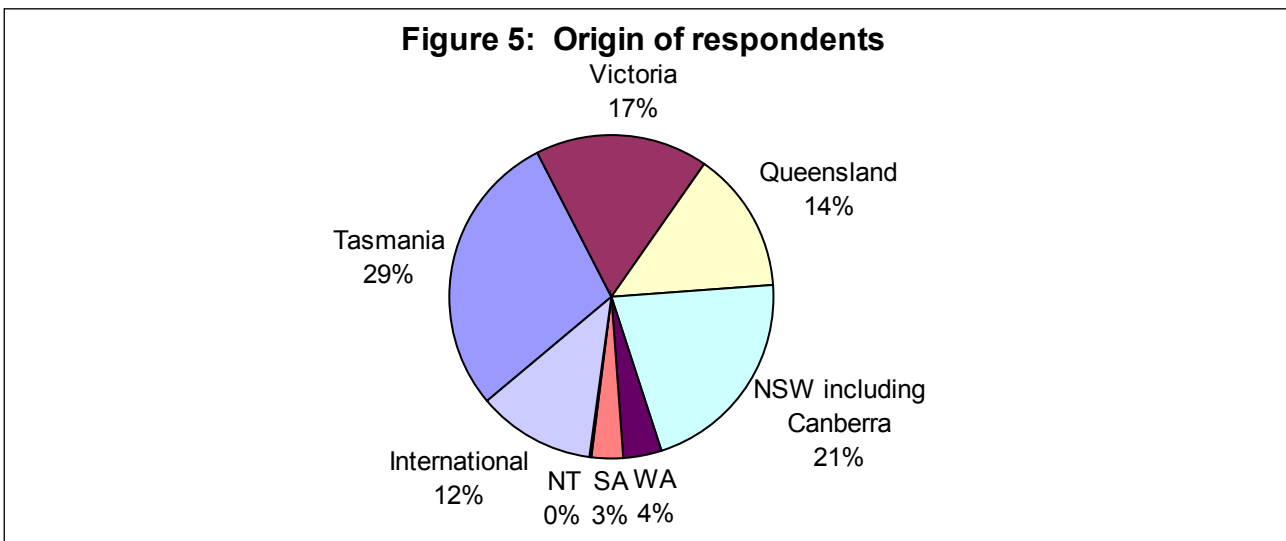
As indicated in Figure 4, the majority of respondents (50%) travelled with a partner or as a couple, 24% with family or friends from interstate and 16% with family or friends who were Tasmanian residents. 7% of respondents travelled with family or friends from overseas.



Q5 and Q6. Origin of respondents (n=708)

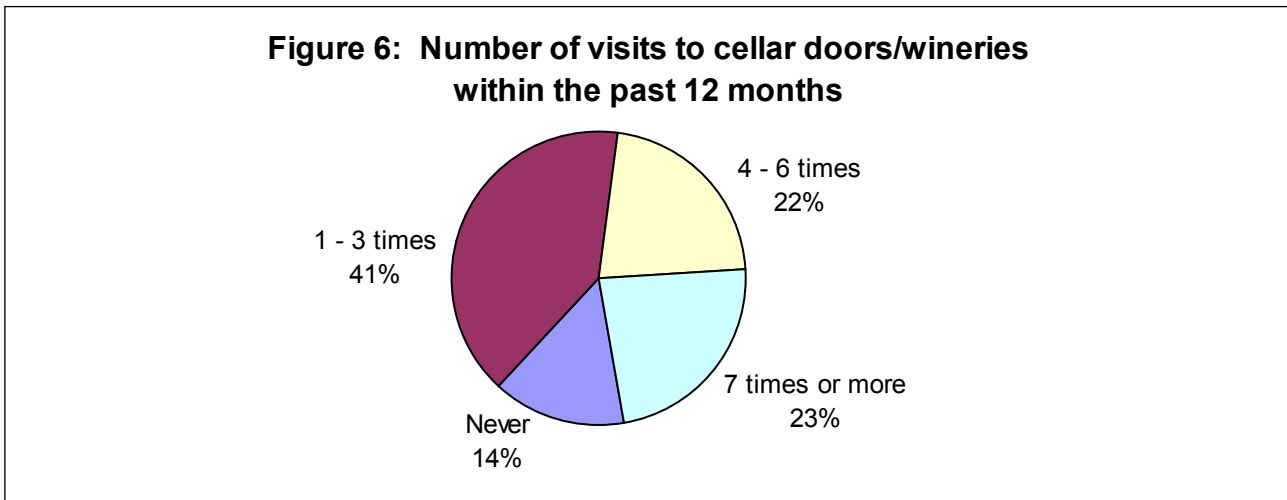
As indicated in Figure 5, 29% of survey respondents were local Tasmanians, 12% were from overseas and 59% from interstate. Major interstate respondent categories included 21% from New South Wales (including Canberra, at <2%), 17% from Victoria and 14% from Queensland.

Of the 12% international respondents, 2% comprised visitors from the USA, 4% from the United Kingdom (excluding Ireland), 2% from New Zealand and less than 0.5% from a diversity of other origins including Canada, Belgium, Holland, Denmark, Italy and Chile.



Q11. Number of visits to cellar doors/wineries (in any location, including Tasmania) within the past 12 months (n=723)

As Figure 6 indicates, respondents appear fairly evenly distributed between those visiting cellar doors never or less than 3 times in the past twelve months (a total of 55%), and very regular visitors of cellar doors, either visiting 4 to 6 times or 7 times or more in the past 12 months (45%).



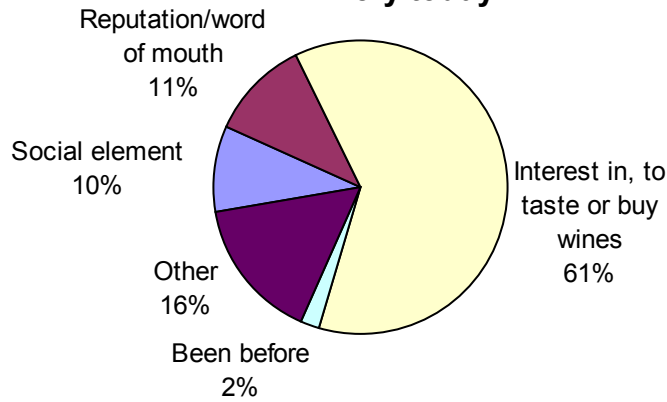
Q12. Main reasons for visiting this cellar door/winery today (n=693)

Respondents were asked, in their own words, what were their main reasons for visiting this particular cellar door/winery today. This question was open-ended, to capture respondents' top-of-mind responses rather than potentially influence responses by offering response choices. There is, therefore, some overlap between categories of main reason for the visit.

Figure 7 indicates respondents' main reasons for visiting the cellar door, with by far the highest reason proportion (61%) being the respondent's interest in wine, or to taste or buy wine. Respondent comments within this category included the following reasons: "a love of wine", to "buy interesting wine" and "buy good wine", "curiosity about Tasmanian wines" and "curiosity to try wines from the region". Respondents grouped in the reputation/word of mouth category (11%) provided responses such as "enjoyment and reputation", "Pinot reputation", "reputation, ease of wine route", "wines encountered at wine show" and "the fabulous Pinot Gris".

The 'Other' category of responses (16%) included respondents who were staying in the region, on a wine tour, sightseeing in the area or simply driving by. This category also included slightly less than 10 respondents who stated "wine route" as their main reason to visit, or made reference to the Tamar Valley Wine Route.

Figure 7: Main reasons for visiting this cellar door/ winery today

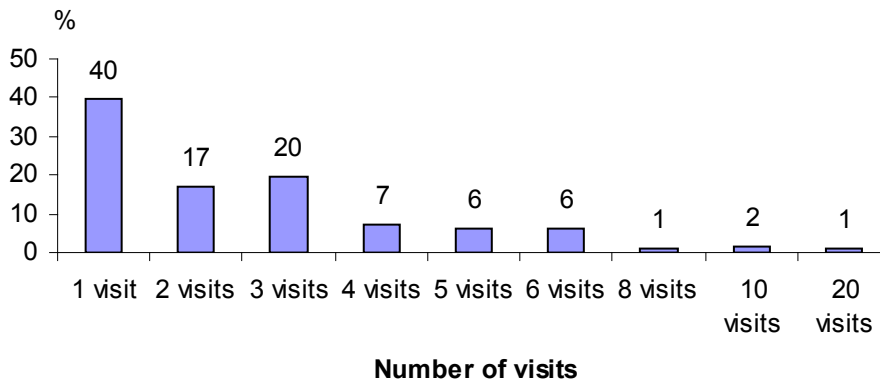


Q13. Number of previous visits to this cellar door (where survey was completed) (n=111)

Of total survey respondents, 111 (15%) had previously visited the cellar door/winery where the survey was completed. Conversely, this data indicates that 85% of respondents had never previously visited the cellar door.

Of the 111 respondents who had previously visited, the majority had visited once previously (40%), with 20% visiting 3 times previously and 17% twice previously.

Figure 8: Number of previous visits to this cellar door



Q14. Services or facilities that most attracted respondents to visit the cellar door

Table 1, below, indicates the ranking of cellar door/winery services or facilities that were most important in attracting respondents to visit. The most important factor was the reputation of the wine, with 27% of respondents selecting this response. Proximity to main road (18%), free wine tastings (15%) and appealing architecture and surrounds (13%) were also important qualities. The least important factors for respondents were that the cellar door be child friendly or include an art gallery or other attractions (2% each).

Table 1: Services or facilities that attracted today's visit to the cellar door

	Frequency	Percent
Good reputation of the wine	443	27.3%
Proximity to main road	295	18.2%
Free wine tastings	247	15.2%
Appealing architecture and surrounds	216	13.3%
Availability of food	187	11.5%
Good customer service reputation	163	10.0%
Child friendly	27	1.7%
Art gallery/other attractions	25	1.5%
None of the above	20	1.2%
	1623	100%

NB. Total respondent number unable to be provided as respondents could tick more than one response option.

Q15. Has, or will, wine be purchased during today's visit? (n=709)

Table 2 examines respondent wine purchasing behaviour at the specific cellar door/ winery where the survey was completed. Slightly more than 70% of respondents indicated they would, or had, purchased wine during their visit. Of those who made a purchase (508 respondents) 73% indicated they had, or would, purchase between 1 and 3 bottles of wine. 15% were unsure whether they would purchase wine, and 13% indicated no wine would be purchased.

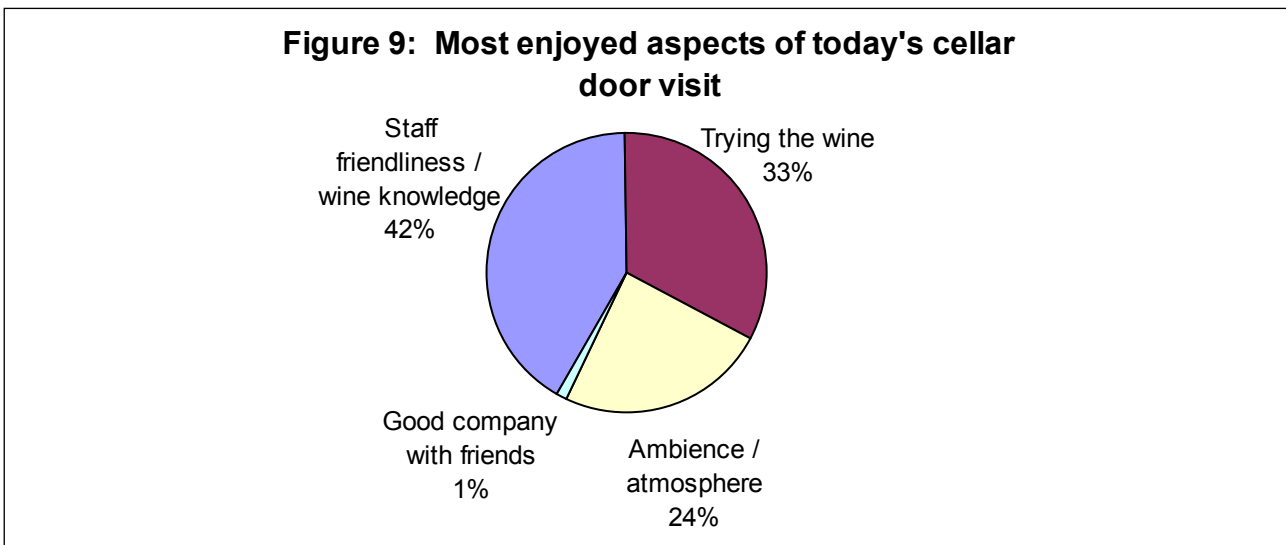
Table 2: Wine purchasing behaviour

Have you, or will you, purchase any wine here today?		Frequency	Percent
Valid	Yes	508	71.7%
	No	92	13
	Unsure	109	15.4%
If yes to purchases, how many bottles		Frequency	Percent
	1-3	241	73.3%
	4-6	43	13.1%
	7-12	36	10.9%
	13+	9	2.7%
Valid	Total	329	100%

Respondents were asked if there were any reasons why they would not purchase wine during their visit. Of the 13% of respondents who indicated they would not purchase wine, the overwhelming reason provided was 'transport problems', followed by the cost of wine, and that the wine was not to their taste.

Q16. Most enjoyable aspects of today's cellar/door winery visit (n=697)

As indicated in Figure 9, respondents stated that the most enjoyable aspect of today's visit was staff friendliness and/or staff wine knowledge (42%). Trying the wine (33%) and ambience and/or atmosphere (24%) were also important factors.



Q17. Satisfaction levels with today's experience at the cellar door/winery (n=725)

While the scale for question 17 ranged from extremely satisfied to extremely dissatisfied, 92% of responses fell within the 'extremely satisfied' and 'very satisfied' categories, with the additional 8% of responses falling within the 'satisfied' category, indicating a strong satisfaction level from respondents with their winery/cellar door experience.



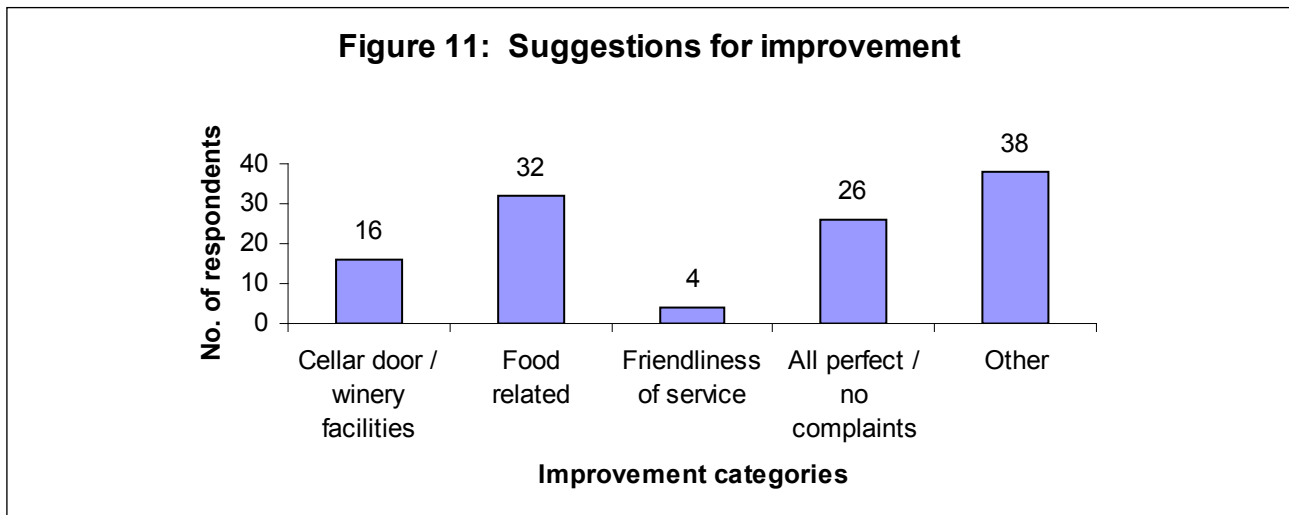
NB Scale is extremely satisfied to extremely dissatisfied

Q18. Suggestions for improvement following today’s cellar door/winery visit (n=116)

116 respondents (16%) provided responses to question 18, as indicated in Figure 11. Of this, 26 responses were positive, including comments such as “all perfect”, “excellent day” and “little to improve”.

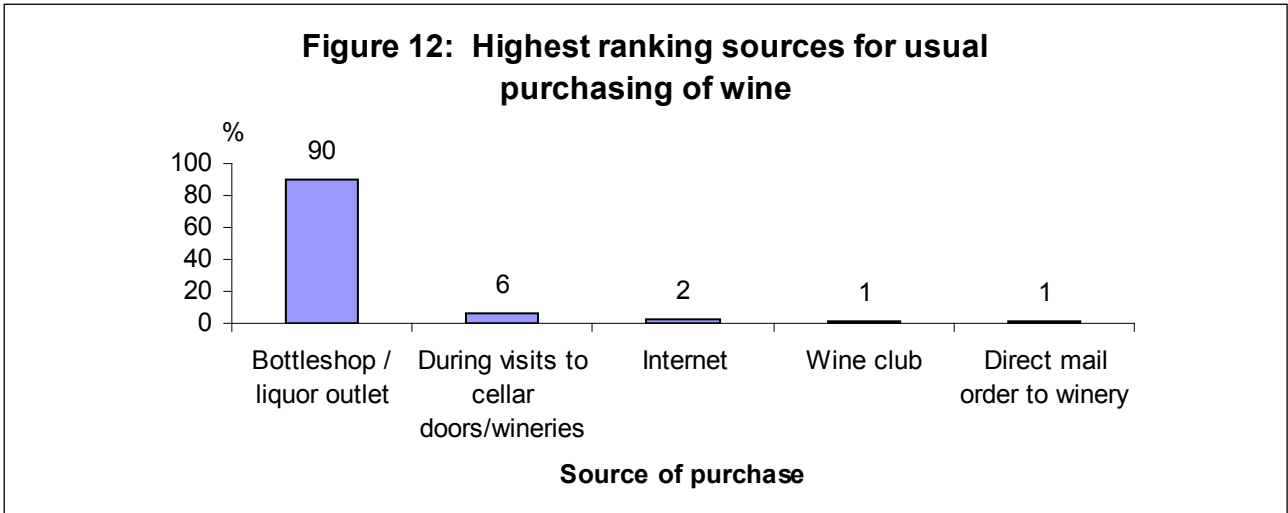
The remaining 90 comments are grouped into the following 4 categories, accompanied by examples of suggested improvements:

- cellar door/winery facilities related, 16 comments (eg. “umbrellas and outdoor seating please”, “overlong gravel road”, “bigger cellar door” and “bar stools”)
- food related, 32 comments (eg. “freely available water”, “separate setting for those sharing a platter”, “a wider selection of food to go with the wine”, “cheese with wine”, “include more sweet wines in the tasting” and “light lunches”)
- friendliness of service, 4 comments (eg. “friendlier staff!”, “enthusiasm of staff towards customers presence” and “more friendly staff”)
- other, 38 comments (eg. “more information about vineyards”, “wine tasting not free”, “door was closed although sign said open” and “more information about Tas wines and what makes them what they are”).



Q19. Highest ranking sources relating to where respondents usually purchase wine (n=641)

As Figure 12 indicates, the vast majority of respondents (90%) usually purchase their wine from a bottleshop or liquor outlet, with 6% of indicating they usually purchase their wine during visits to cellar doors or wineries.



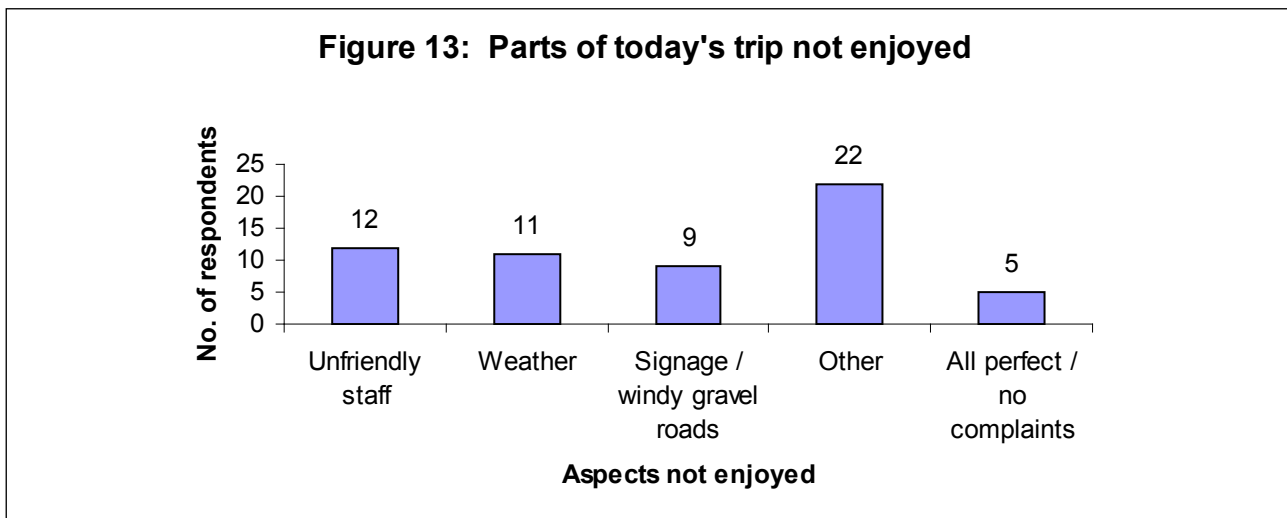
Q20. Other planned cellar door/winery visits today and for this trip (n=400 and n=303 respectively)

54% of all respondents indicated they were planning to visit other cellar door/winery visits on the same day as completing the survey. When providing information on which cellar doors/wineries respondents intended to visit, the range was extremely diverse, with no one cellar door being named more than three times.

Of all respondents, 41% indicated they were planning to visit other cellar doors/wineries during their entire trip (this trip). Once again, when asked which cellar doors/wineries respondents were intending to visit, the range was diverse, with individual cellar door names mentioned between one and a maximum of six times. Many respondents simply indicated they were undecided as to which ones they would visit, or would visit “as many as possible”, “as we drive along” and “as situated on the main road”.

Q21. Parts of today’s trip that were not enjoyed (n=59)

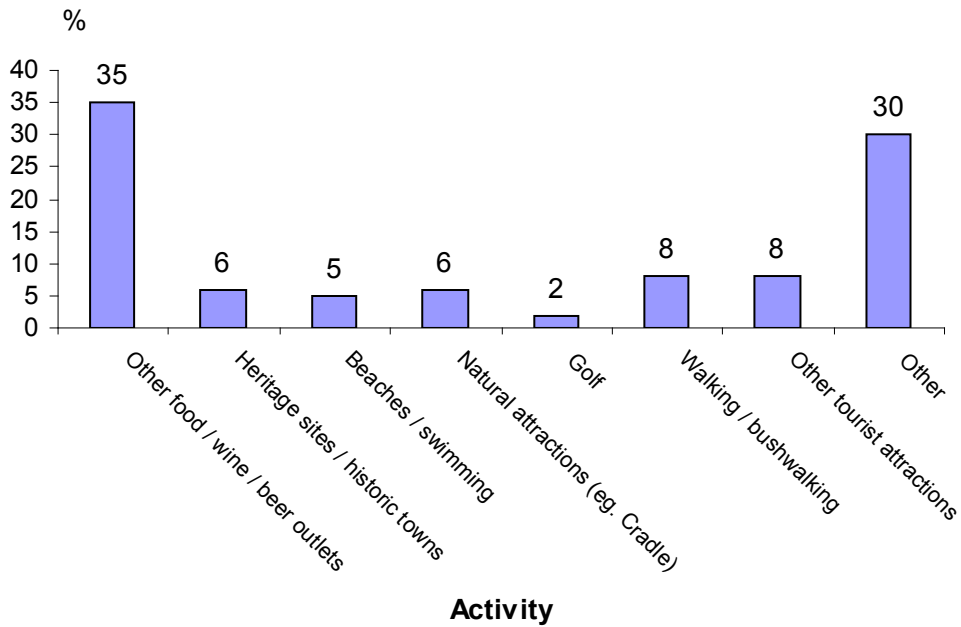
Of the 59 respondents who answered this question, 5 respondents provided positive responses such as “nothing at all, perfect” or “was all good”. The remaining 54 responses can be broadly grouped into the categories of unfriendly staff, weather, signage/roads and other. Comments relating to weather ranged from “unfortunate weather”, “wind and rainy weather”, to “heat” and “sunburn”. The ‘other’ category included several comments relating to the Cellar Door Survey being overlong, lack of cafes and lunch sites, the cost of tastings and wines not being to respondents’ tastes.



Q22. Other activities for the day (n= 535)

For the 535 respondents providing a response to this question, visiting other food, wine or beer outlets ranked the highest activity for the day, accounting for 35% of responses. The categories of ‘walking/bushwalking’ and ‘visit other tourist attractions’ each received 8% of responses. 30% of responses were grouped into an ‘other’ category, due to diverseness of response. These responses included “Festivale”, “Wooden Boat Festival”, “antique shop, art gallery”, “admiring scenery”, “driving around” (10 responses) and “camping on the East Coast”.

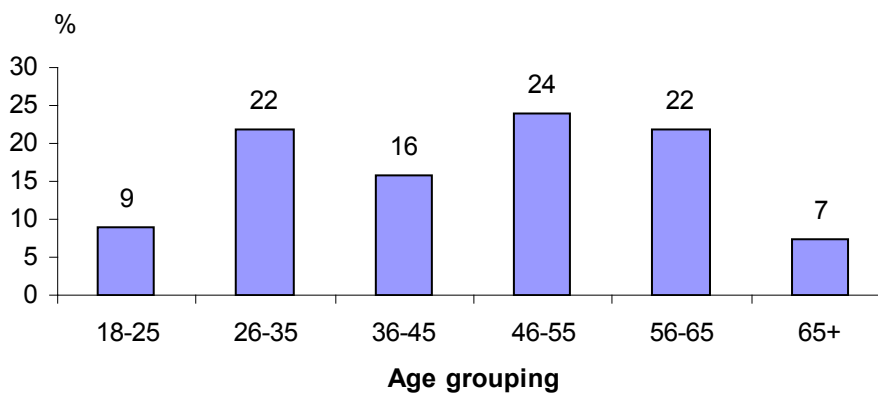
Figure 14: Other activities participated in today



Q23. Age of respondents (n=728)

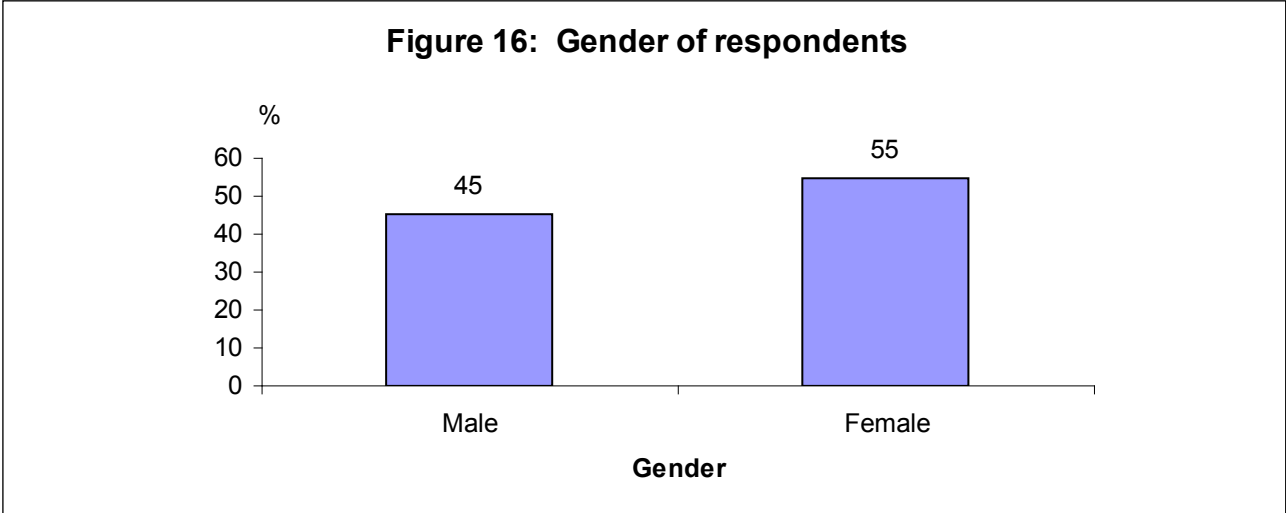
The most important age groupings of respondents, as indicated in Figure 15, were age groups 46-55 (24% of respondents) and 26-36 and 56-65 (22% of respondents each). The 36-45 and 18-25 age groups accounted for 16% and 9% of respondents respectively.

Figure 15: Age of respondents



Q24. Gender of respondents (n=701)

Female respondents outnumbered male by 55% to 45%, as indicated in Figure 16, below.

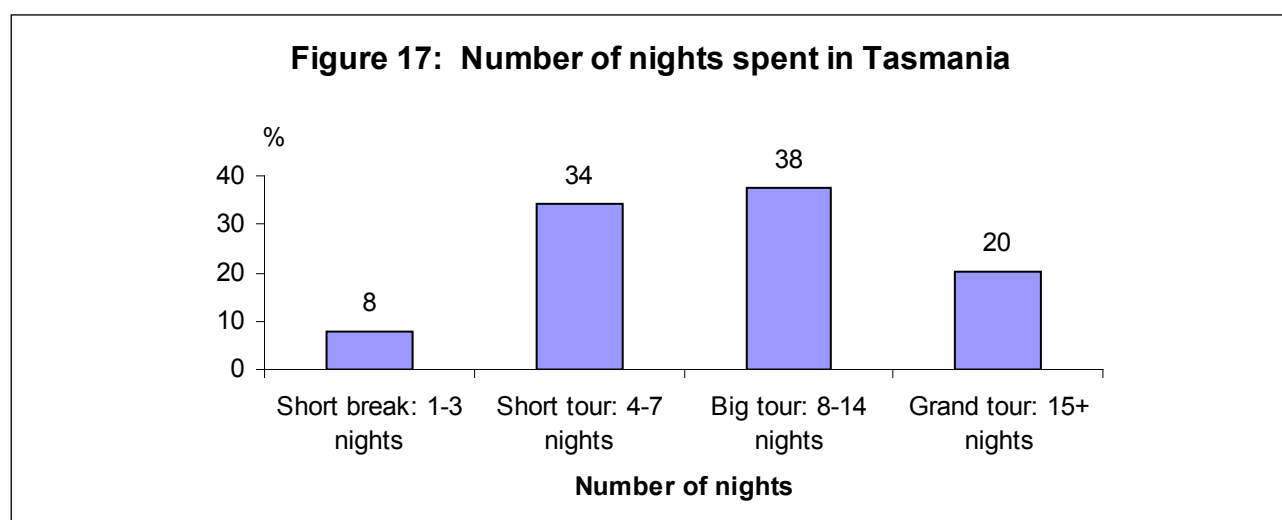


Interstate and International Results

The following sections only include data from visitors to Tasmania from interstate and overseas.

Q8. Number of nights spent in Tasmania on this trip (n=507)

As indicated in Figure 17, the majority of interstate and international survey respondents stayed for a Short Tour of between 4 and 7 night (34%) or for a Big Tour of between 8-14 nights (38%). Short Break stays of between 1 and 3 nights comprised 8% of respondents, with 20% of respondents staying 20 nights or more.



Q9. Was information regarding Tasmanian cellar doors/wineries or restaurants/ eateries actively sought prior to arrival in Tasmania (n=514).

AND

Q10. Was information regarding Tasmanian cellar doors/wineries or restaurants/ eateries actively sought after arrival in Tasmania (n=509)

Table 3 indicates responses to question 9, in both absolute numbers and by percentage. As shown, the majority of the 514 respondents (68%) sought information regarding Tasmania cellar doors or restaurants after their arrival in Tasmania, although 43% indicated they had sought information prior to arrival. Clearly a number of respondents sought information both before and after arrival, highlighting the need to ensure information distribution points are managed to meet this consumer behaviour.

Interestingly, 57% of respondents did not actively seek cellar door/winery or restaurant information before arrival in Tasmania, and 32% did not actively seek information after arrival, but these respondents were still visitors at the cellar doors/wineries participating in this Survey.

Table 3: Did visitors actively seek information before or after arriving Tasmania?

	Before Frequency	After Frequency	Before %	After %
Yes	223	346	43	68
No	291	163	57	32
Total	514	509	100	100

Table 4 indicates information sources used by the 43% of respondents actively seeking winery/restaurant information before arrival in Tasmania, and by the 68% of respondents actively seeking information after arrival in Tasmania.

The highest-ranking information sources used to seek cellar door/winery information prior to arrival in Tasmania was the DiscoverTasmania.com website (14%), wine route brochures (13%) and family/friends (12%). After arrival, the most important information sources were wine route brochures (31%), family/friends (11%) and the Tasmanian Holiday Planner (9%).

For Tasmanian restaurant/eatery information, the highest-ranking information sources used by respondents prior to arrival in Tasmania were family/friends and the Discovertasmania.com website (8% of respondents each) and the Tasmanian Holiday Planner (4%). The highest-ranking sources of information used after arrival in Tasmania were wine route brochures (10%), family/friends (8%) and Tasmanian Holiday Planner (5%). Tourism information centres and word-of-mouth were also listed by respondents as other relatively important sources.

Table 4: Which information sources did visitors use both before and after arrival in Tasmania?

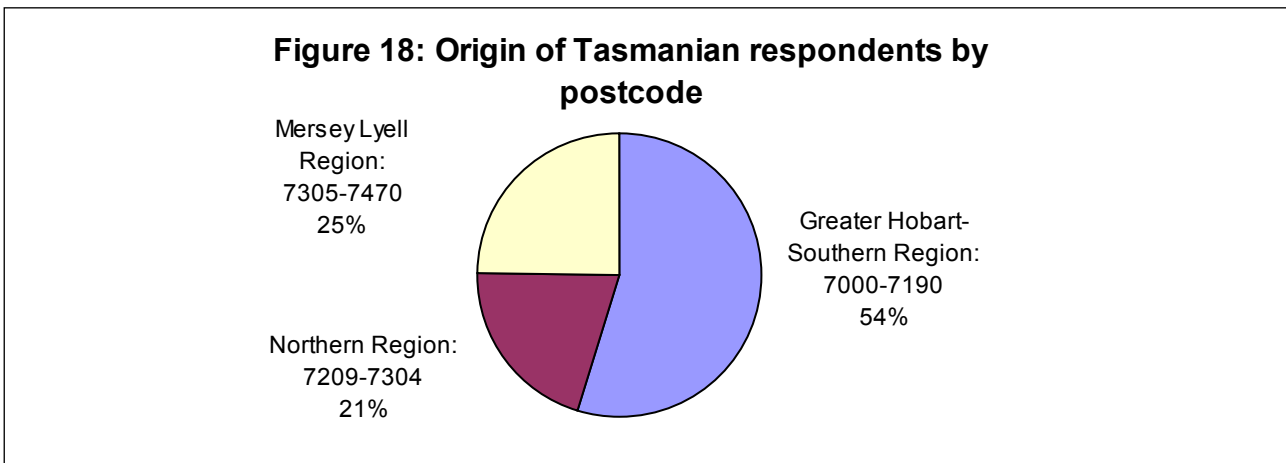
Information sources used for cellar doors/wineries				
	Before	After	Before	After
	Frequency	Frequency	%	%
Family/friends	86	81	12	11
Wine route brochures	92	226	13	31
Tasmanian Holiday Planner	50	63	7	9
Tasmanian Cellar Door & Farm Gate Guide	41	49	6	7
Discovertasmania.com website	105	27	14	4
Other sources used: Internet (n=19), Lonely Planet (n=11), wine guide books (n=9), previous visit (n=2), hotel staff (n=1), work colleague (n=1)				
Information sources used for restaurants/eateries				
	Before	After	Before	After
	Frequency	Frequency	%	%
Family/friends	56	56	8	8
Wine route brochures	23	70	3	10
Tasmanian Holiday Planner	26	36	4	5
Tasmanian Cellar Door & Farm Gate Guide	17	15	2	2
Discovertasmania.com website	62	12	8	2
Other sources used: Tourism information centres (n=16), word-of-mouth (n=14), other brochure/map (n=12), Lonely Planet (n=7), local knowledge (n=4), internet (n=3)				

Tasmanian Results

The following sections only include data from Tasmanian residents.

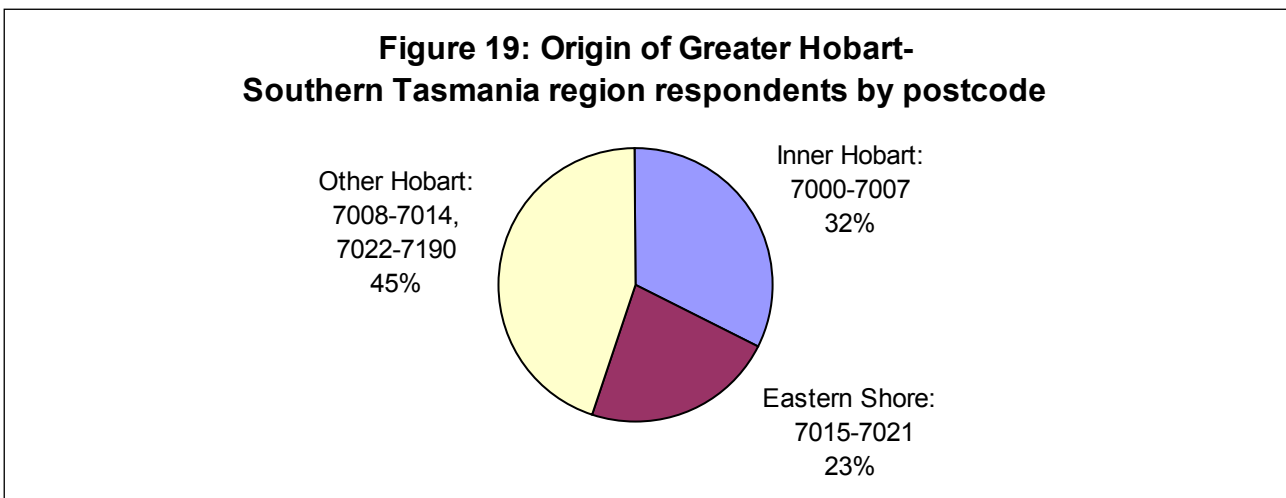
Q5. Origin of Tasmanian respondents by region (n=203), and origin of greater Hobart/Southern region Tasmanian respondents by postcode (n=111)

As indicated in Figure 18, of the 203 respondents to the Survey who were local Tasmanians, 54% reside in the Greater Hobart-Southern region, 25% in the Mersey Lyell region and 21% in the Northern region.



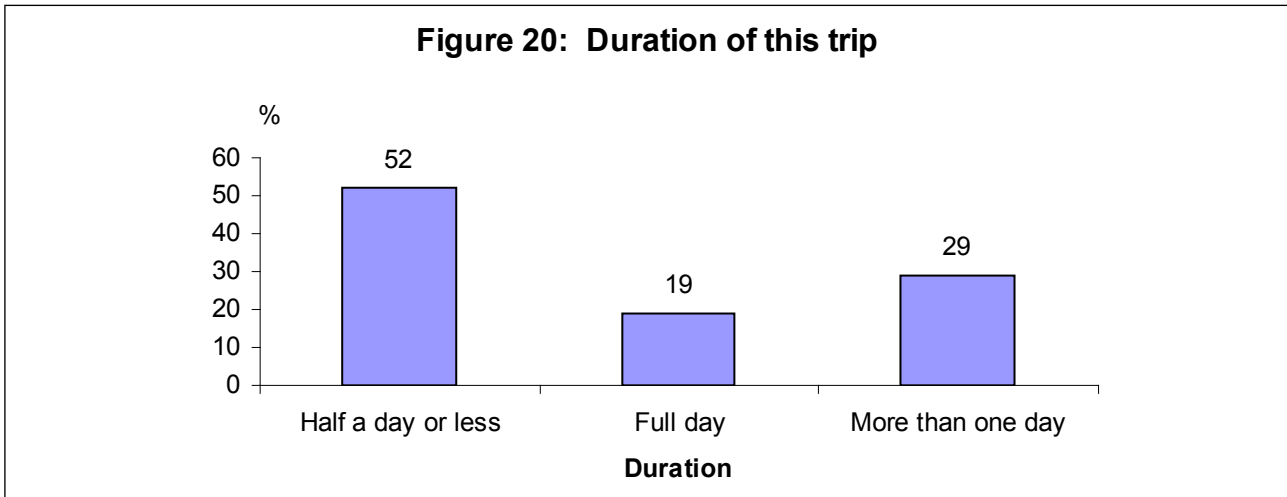
NB. Further segmentation of Tasmania's Northern region and Mersey Lyell region respondents is not provided due to the small sample size.

As indicated in Figure 19, of the 54% of Tasmanian survey respondents residing in the Greater Hobart-Southern region, the majority (45%) reside in 'other Hobart', with inner Hobart postcodes accounting for 32% and Eastern Shore postcodes 23%.



Q7a. Duration away from home on this trip (n= 235)

The majority of Tasmanian respondents to the Survey (52%) indicated a half-day or less duration away from home for their trip, as indicated in Figure 20, below. 29% of Tasmanian respondents indicated a trip duration of more than one day, and 19% a trip duration of a full day.



Q7b. Main reason for today's trip (n=227)

96% of Tasmanian respondents indicated that the main reason for their trip today was for leisure purposes, with 4% indicating the trip was for business purposes.

Of the above respondents, 27 provided additional comments relating to the reason for today's trip. These can be grouped into the following categories: wedding anniversary/hens night/birthday (n=7), to taste or appreciate wine (n=5), accompanying interstate friends or family (n=4), business purposes (n=2) and 'other' (n=9).

Q7c. How Tasmanian respondents found out about the specific cellar door/winery visited (n=238)

Table 5 groups these responses into several meaningful categories. The most important ways in which Tasmanian respondents found out about the specific cellar door/winery visited were by word-of-mouth (19%), been before (16%) and advertising/publications (14%). 73 responses were extremely diverse and therefore grouped into an 'other' category, which included responses such as "Rotary Club helps to pick the grapes", "accidental turn", "former waiter", "internet", "can't recall", "open vineyards weekend", and "on a tour".

Table 5: How Tasmanian respondents found out about the cellar door/winery visited

Information Source	Frequency	%
Advertising/publications	33	14
Been before	37	16
Driving by	19	8
Word-of-mouth (mainly friends)	45	19
Road signage	13	5
Local knowledge	15	6
Wine routes	3	1
Other*	73	31

*Total 'other' responses is approximate as respondents occasionally provided more than one set of comments as a response

Appendix 1: 2007 Tasmanian Cellar Door/ Winery Customer Survey Questionnaire



TASMANIAN CELLAR DOOR/WINERY CUSTOMER SURVEY 2007



Thank you for taking the time to provide us with your valuable feedback. All information collected in this survey will be used only by Wine Industry Tasmania and Tourism Tasmania, to assist in providing improved services to you in the future. Your responses will be anonymous and treated in the strictest confidence.

Please tick relevant boxes throughout the survey

1 Please indicate your level of interest in wine:

- I am interested and knowledgeable about wine.....
- I am interested in wine but not necessarily knowledgeable.....
- I am not that interested in wine.....

2 What types of wine do you enjoy?

- All wines.....
- Big reds.....
- Sweet whites.....
- Bubbly.....
- Elegant reds.....
- Dry whites.....
- Dessert wines.....
- Fortified wines.....

3 How many are in your immediate travelling party today?

- One – only me.....
- Two.....
- Three.....
- Four.....
- Five or more.....

4 Who are you travelling with today?

- One – only me.....
- With a partner/as a couple.....
- Family or friends from interstate.....
- Family or friends from overseas.....
- Family or friends who are Tasmanian residents.....
- Other *please specify*

5 If you are an Australian citizen, what is your current residential postcode?

*If you have a Tasmanian postcode, please go to Q.7
If you have a non Tasmanian postcode, please go to Q.8*

6 If you are not an Australian citizen, from which country are you visiting?

Please go to Q.8

IF YOU ARE A TASMANIAN RESIDENT

7 a. How long are you away from home on this trip?

- Half a day or less.....
- Full day.....
- More than one day.....

Please specify number of nights

b. What is the main reason for your trip today?

- Leisure purposes.....
- Business.....
- Other reason *please specify*

c. How did you find out about the cellar door/winery you are visiting today?

-
-
-

Please go to Q.11



IF YOU ARE A VISITOR TO TASMANIA

- 8 How many nights are you spending in Tasmania on this trip?
9. **Before arriving** in Tasmania, did you actively seek information on Tasmanian cellar doors/wineries or restaurants/eateries?
 Yes
 No

If yes, which sources did you use?

Please tick relevant boxes

	Cellar Door/ Wineries	Restaurants/ Eateries
Family/Friends	<input type="checkbox"/>	<input type="checkbox"/>
Wine Route Brochures	<input type="checkbox"/>	<input type="checkbox"/>
Tas Holiday Planner.....	<input type="checkbox"/>	<input type="checkbox"/>
Tas Cellar Door & Farm Gate Guide ...	<input type="checkbox"/>	<input type="checkbox"/>
Discover Tasmania.com website	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>please specify</i>		
.....		
.....		

- 10 **After arriving** in Tasmania, did you actively seek information on Tasmanian cellar doors/wineries or restaurants/eateries?
 Yes
 No

If yes, which sources did you use?

Please tick relevant boxes

	Cellar Door/ Wineries	Restaurants/ Eateries
Family/Friends	<input type="checkbox"/>	<input type="checkbox"/>
Wine Route Brochures	<input type="checkbox"/>	<input type="checkbox"/>
Tas Holiday Planner.....	<input type="checkbox"/>	<input type="checkbox"/>
Tas Cellar Door & Farm Gate Guide ...	<input type="checkbox"/>	<input type="checkbox"/>
Discover Tasmania.com Website	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>please specify</i>		
.....		
.....		

ALL RESPONDENTS PLEASE COMPLETE

- 11 How often have you visited cellar doors/wineries in the last 12 months?
 Never.....
 1 - 3 times.....
 4 - 6 times.....
 7 times or more.....

12 What are your main reasons for visiting this cellar door/winery today?

13 If you have visited this cellar door/winery before, please indicate how many times.

14 What services or facilities most attracted you to visit this cellar door/winery today?

Please rank up to 5 answers, with 1 the most important and 5 the least important

- Availability of food
- Good reputation of the wine
- Proximity to main road
- Appealing architecture and surrounds
- Child friendly
- Good customer service reputation
- Free wine tastings
- Art gallery / other attractions.....
- None of the above
- Other *please specify*

15 Have you, or will you, purchase any wine here today?

Yes

If yes, how many bottles?

No

If no, are there reasons why?

Not sure.....



16 What did you enjoy most about your cellar door/winery visit here today?

17 Overall, how satisfied were you with your experience at this cellar door/winery today?
 Extremely satisfied
 Very satisfied.....
 Satisfied.....
 Dissatisfied.....
 Extremely dissatisfied.....

18 Do you have any suggestions for improvement, following your visit to this cellar door/winery today?

19 Where do you usually purchase your wine?
Please rank up to 5 answers, with 1 the highest amount of wine and 5 the lowest amount

Bottleshop/liquor outlet.....
 During visits to cellar doors/wineries.....
 Internet.....
 Wine club.....
 Direct mail order to winery.....
 Other *please specify*

20 Are you planning to visit the following?
 a Other cellar doors/wineries today?.....
If so, please list.....

b Other cellar doors/wineries during this trip?
If so, please list.....

21 Was there any part of today's trip that you didn't enjoy?

22 What other activities have you been, or will be, involved in while out travelling today?

23 What is your age?
 18-25.....
 26-35.....
 36-45.....
 46-55.....
 56-65.....
 66+.....

24. Please indicate your gender
 Male.....
 Female.....

*Thank you for participating in this survey, we value your comments.
 Please place your completed survey in the box provided.*