

# Vinehealth Australia

## Visitation to Wine Regions

### **The Square Holes Team:**

Jason Dunstone [Research Director]

Christine Dunstone [Senior Project Manager]

### **Supported by:**

Jordon Tomopoulos [Research Analyst]

### **Data Collected:**

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### **Client Contact:**

Cindie Smart

[cindie@cindiesmart.com.au](mailto:cindie@cindiesmart.com.au)

Square Holes Pty Ltd

8-10 Regent Street Nth, Adelaide 5000

[www.squareholes.com](http://www.squareholes.com)

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“An understanding of visitation to SA wine regions,  
and an understanding of tourist knowledge of and  
interest in biosecurity”

## **Key objectives**

1. Demographics of who is visiting SA wine regions and where they are from.
2. Which regions are being visited and when?
3. Why are they visiting?
4. What are they doing when in regions?
5. How are visitors getting to wine regions, and getting around once in regions?
6. Where are visitors staying and eating when in regions?
7. Where do visitors get their information from when planning a visit to a wine region?
8. Do visitors know what biosecurity is?

## **Sub objectives**

9. Are there any businesses or sites that visitors have seen where biosecurity was a focus and was well presented?
10. Do visitors know that Australia has the oldest grapevines in the world, and does this matter to them?
11. If visitors couldn't walk into vineyards, would that impact their decision to go to a cellar door? Would it impact their overall experience?

# Background

The South Australian wine industry is worth \$2.11 billion to the state's economy and the industry directly employs 8,700 South Australians in grape growing and winemaking. South Australia is phylloxera free, fruit fly free, and GM free. These credentials give South Australia a huge boost on the highly competitive world stage. Vinehealth Australia has commissioned Square Holes to discover who is visiting South Australia and the specific wine regions. The information collected will be used to assist Vinehealth in a biosecurity awareness campaign.



The research methodology included an online survey and in-depth interviews. The research explored wine region visitation, expectations and overall awareness of biosecurity.

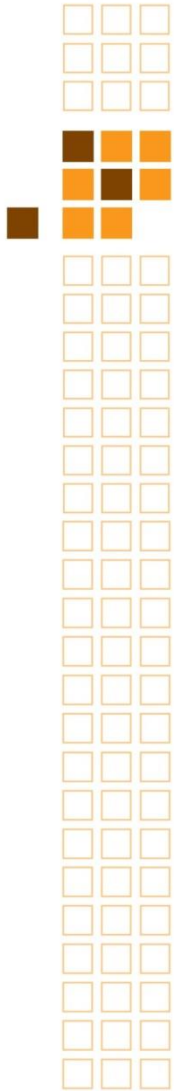
The adjacent tables outline the project approach. The project was carried out in compliance with ISO 20252.

## Online Survey Sample Overview

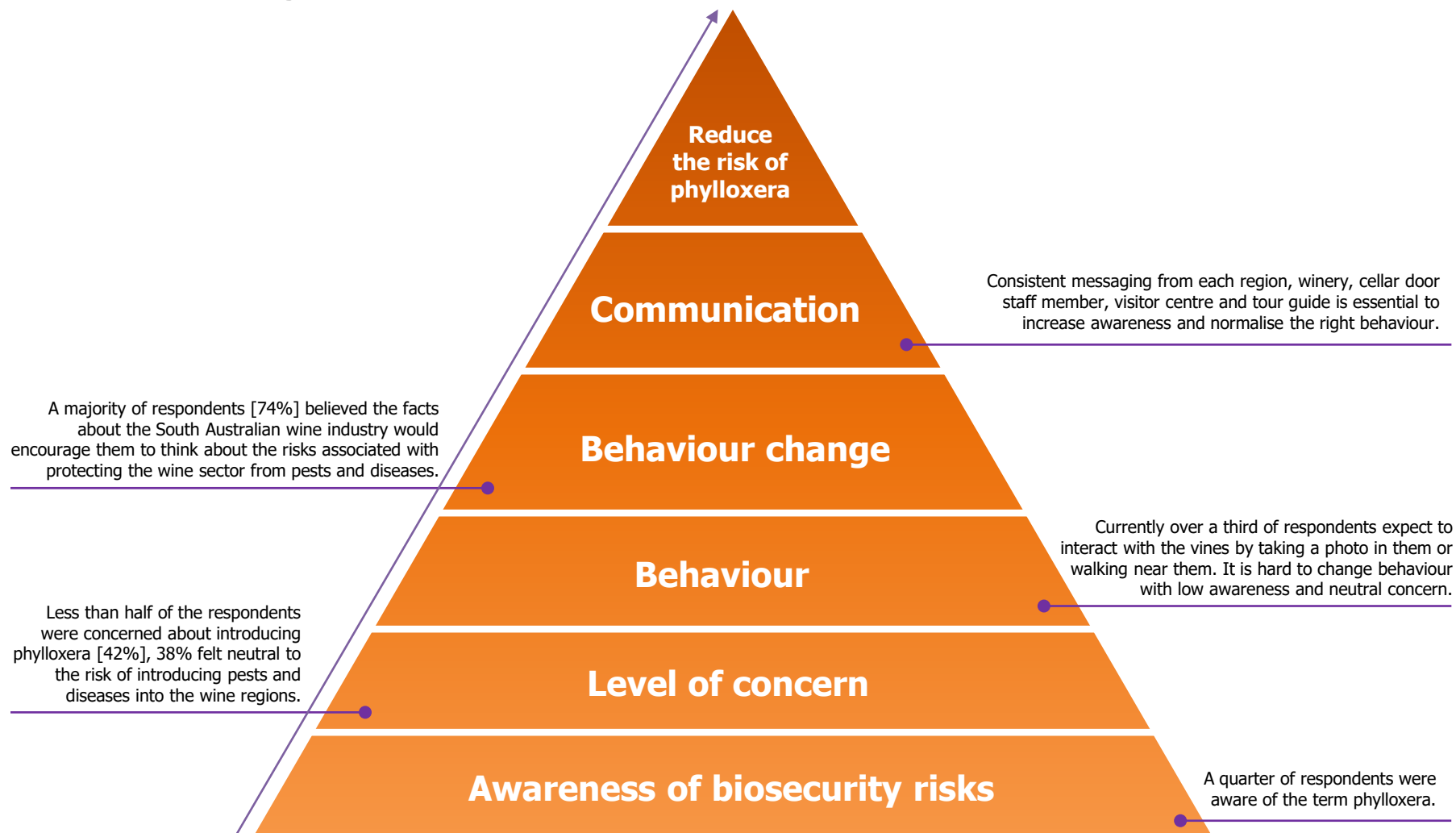
<b>Sample achieved</b>	200
<b>Sample source</b>	General population South Australians over 18 years old
<b>Distribution of survey</b>	Panel provider
<b>Questionnaire length</b>	10 mins
<b>Margin of error</b>	+/- 7%
<b>Collection Dates</b>	31 <sup>st</sup> August – 4 <sup>th</sup> September 2017

## In-depth interviews

<b>Number of interviews</b>	4
<b>Groups interviewed</b>	2 cellar doors 2 regional visitor centres
<b>Interview length</b>	30 mins
<b>Interviewee</b>	Jason Dunstone
<b>Collection Dates</b>	21 <sup>st</sup> August – 23 <sup>rd</sup> August 2017



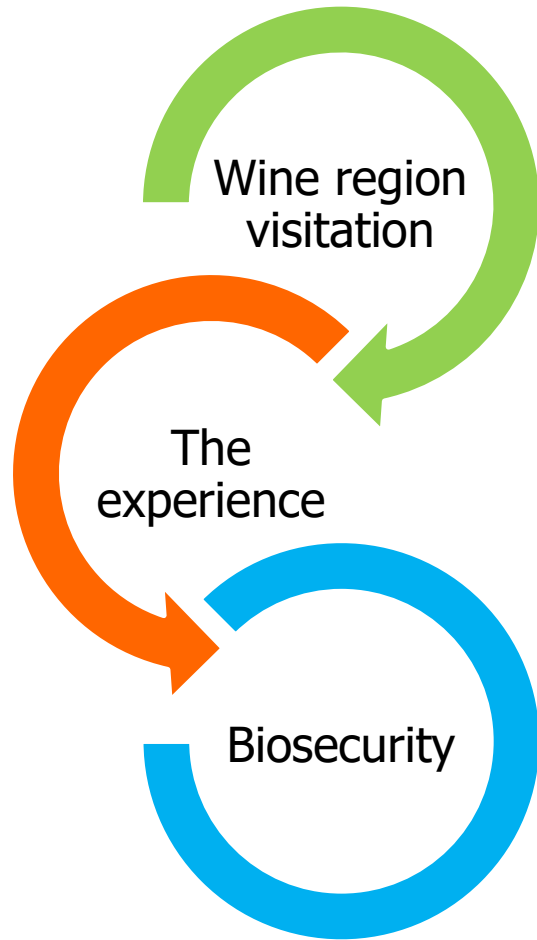
# Summary of Findings



- ❑ **A quarter of respondents were aware of phylloxera** [25%] and almost half [44%] were aware of biosecurity.
- ❑ **Warning signs and brochures** were the most recognised channels of the biosecurity and phylloxera message.
- ❑ **Respondents were concerned with the introduction of pets and diseases in South Australian wine regions** [42%] because of the economic importance of the State's wine, tourism and food industries.
- ❑ **Over a third of respondents expect to take a photo amongst the vines and walk through the vineyard.**  
Females and younger respondents had higher expectations to interact with the vines compared to other segments.
- ❑ Over half the respondents [54%] believed none of the suggested biosecurity measures would impact their experience.  
The most detrimental precaution which would impact visitor experience was not being able to take a photo amongst the vines [17%].







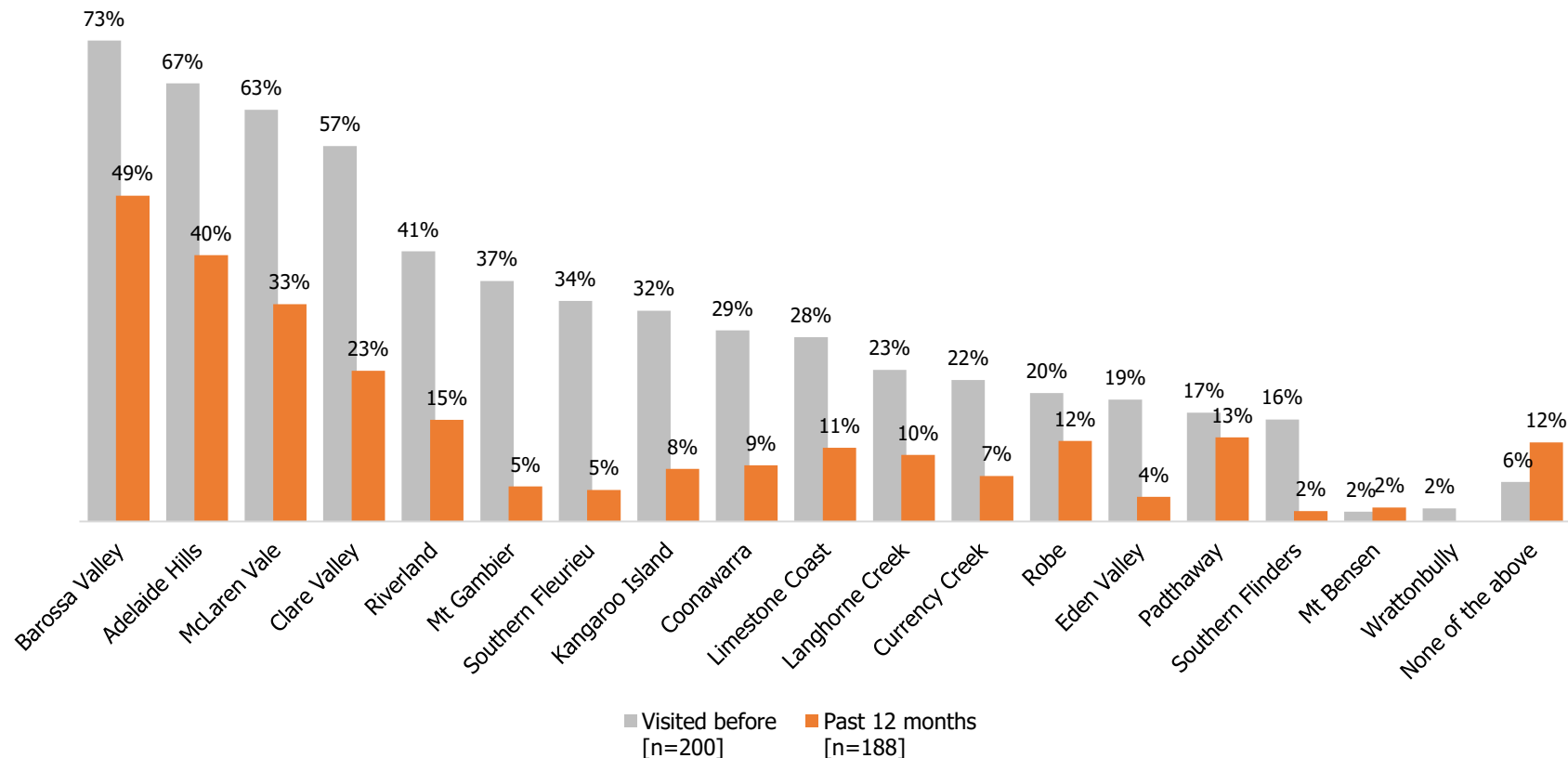
# The Story

# Wine region visitation

# Wine region visitation

The Barossa Valley is the wine region that most respondents recalled visiting [73%], followed by the Adelaide Hills [67%], McLaren Vale [63%] and Clare Valley [57%].

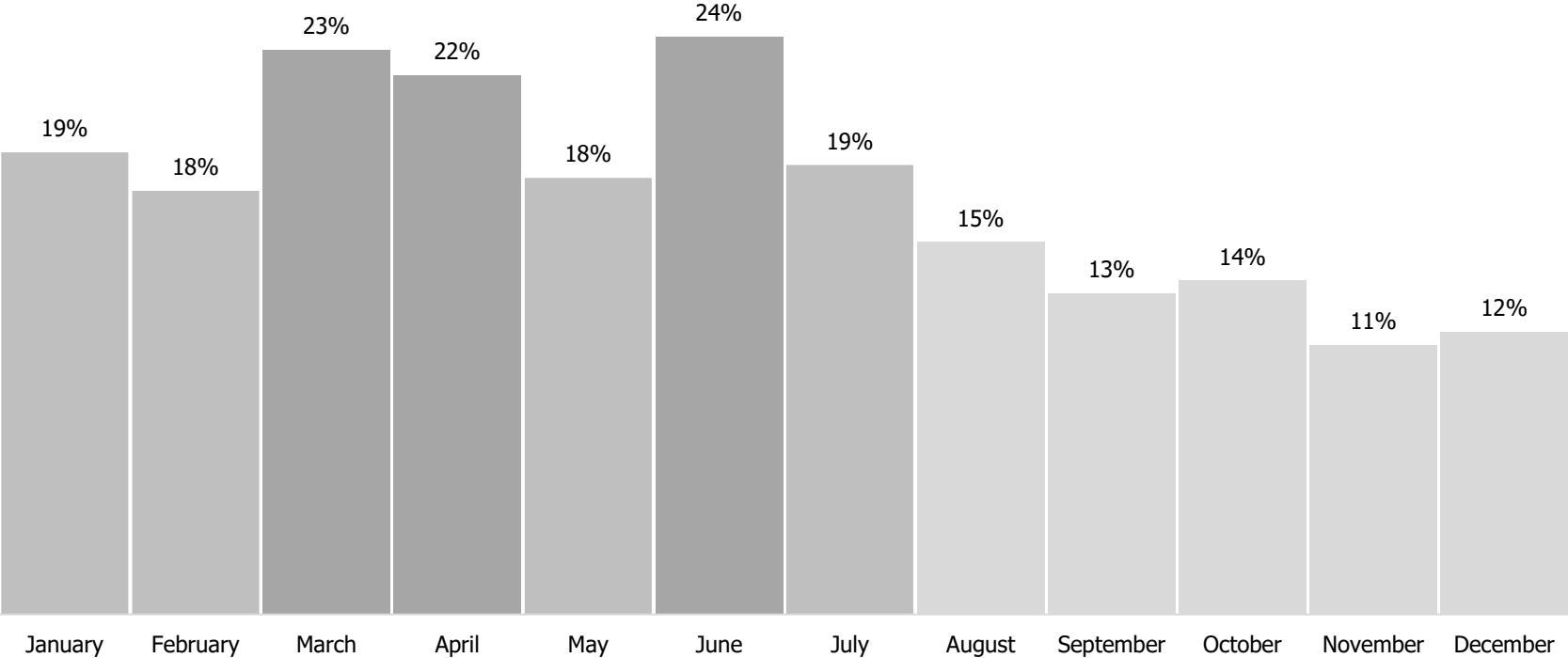
## Q7/8. Visited regions



# Wine region visitation

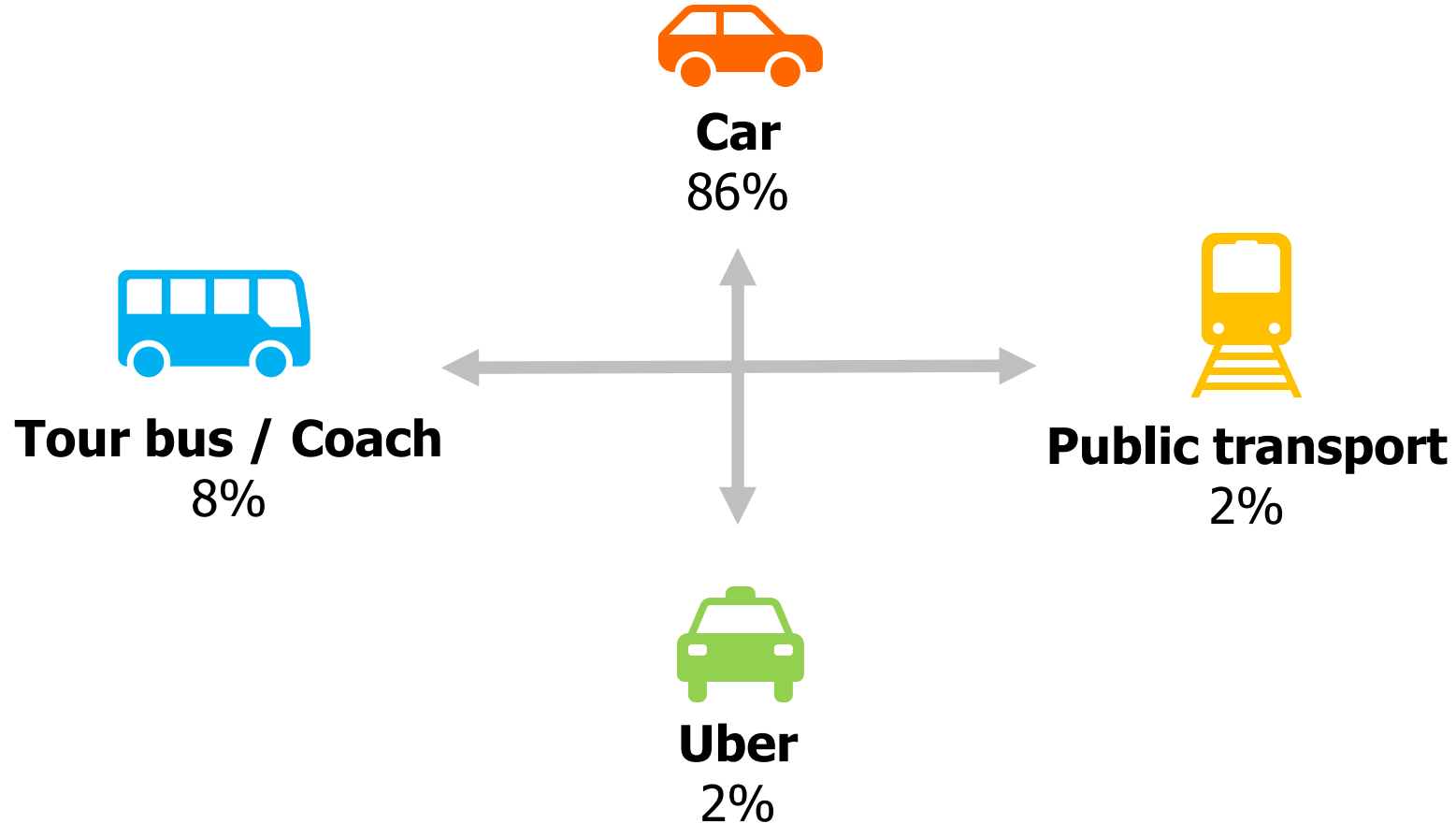
The months of June, March and April were the three most popular for wine region visitation within South Australia.

**Q9. Wine region seasonality [past 12 months]**  
[n=188]



# Wine region visitation

Q29. Means of transport to wine regions:



# The experience

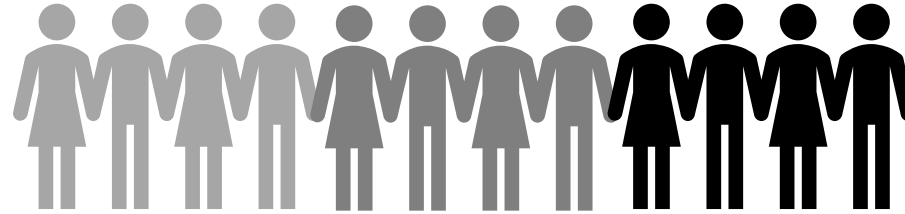
**Q10. How would you describe an ideal day visiting a wine region?**



n=200

# The experience

**Q11. When visiting South Australian wine regions, which of the following would you expect to do?**



**37%**  
take a photo  
amongst the vines

**34%**  
walk near the  
vineyards

**21%**  
walk through the  
vineyards

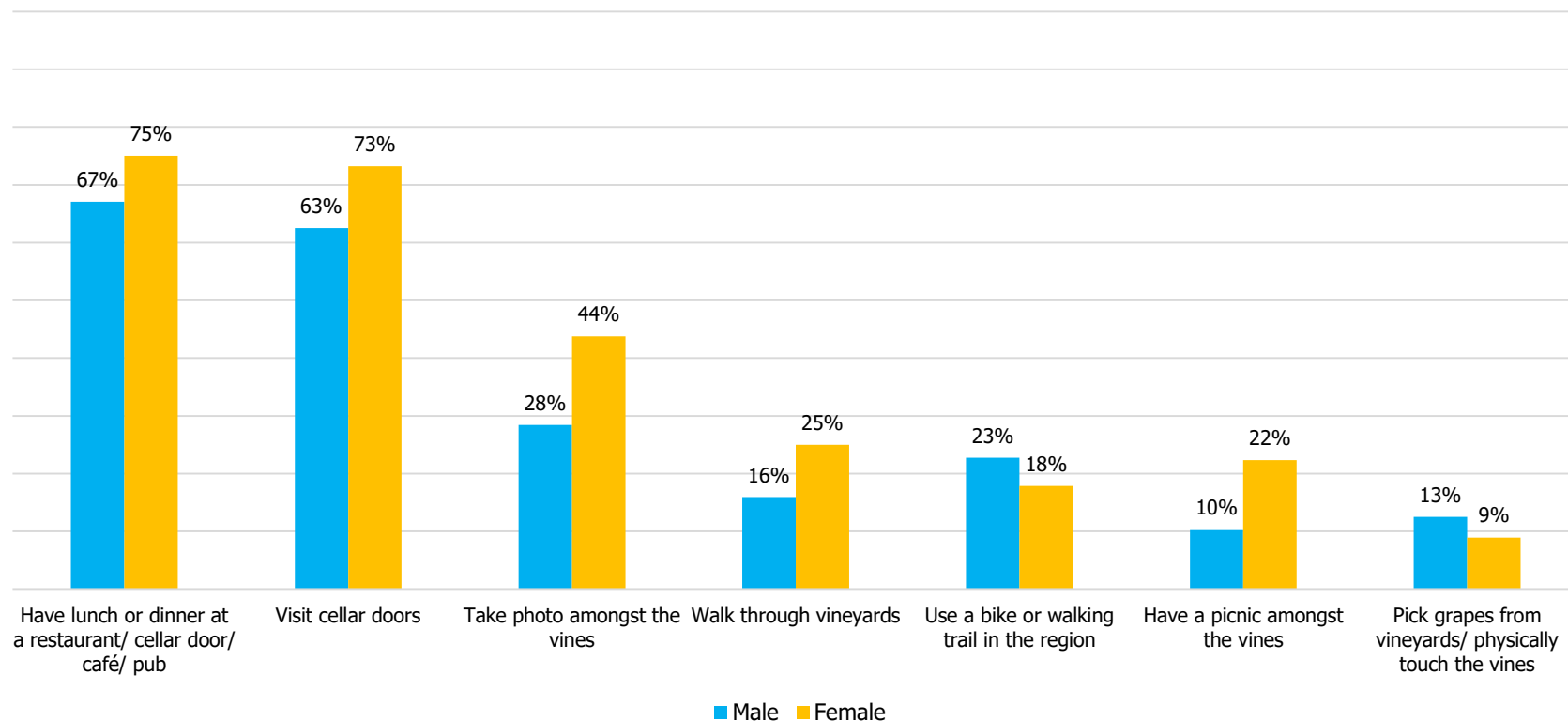


# The experience

Females are more likely to have lunch or dinner out, visit cellar doors and interact with the vineyards through taking photos, walking through the vineyards and by having picnics. Males are more likely to use bike or walking trails in the regions as well as pick grapes or physically touch the vines.

## Q11. Experience expectations by gender

[n=200]

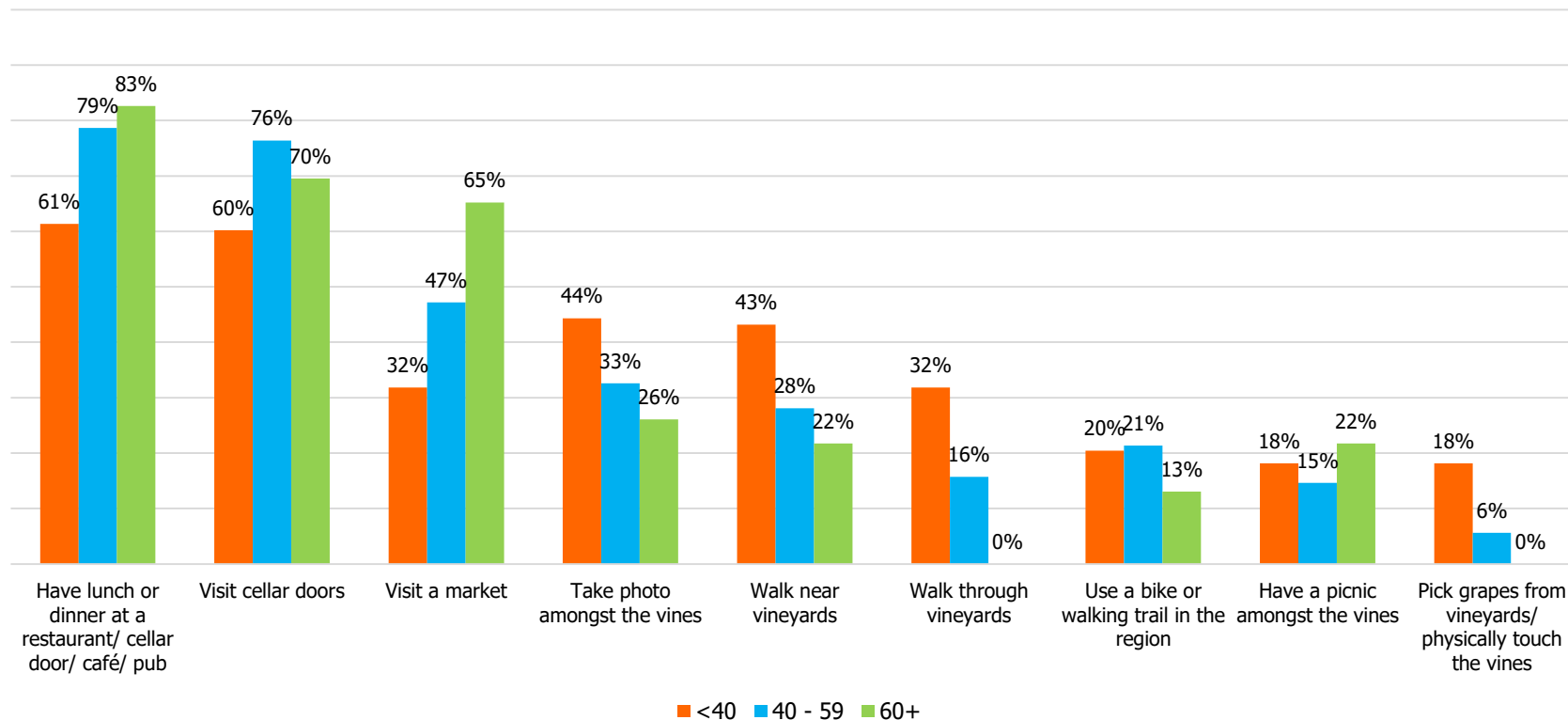


# The experience

The 60 and over age group is more likely to have lunch or dinner at a venue and visit markets compared to the younger age groups. The under 40 year old segment is more likely than the other age groups to interact with the vineyards by taking photos amongst the vines, walk near the vineyards and physically touch the vines.

## Q11. Experience expectations by age

[n=200]



## Q12. Top three impacts on experience:



15% **Needing to wash shoes** in disinfectant before and after any vineyard tour



17% **Not being allowed to take photos** amongst the vines



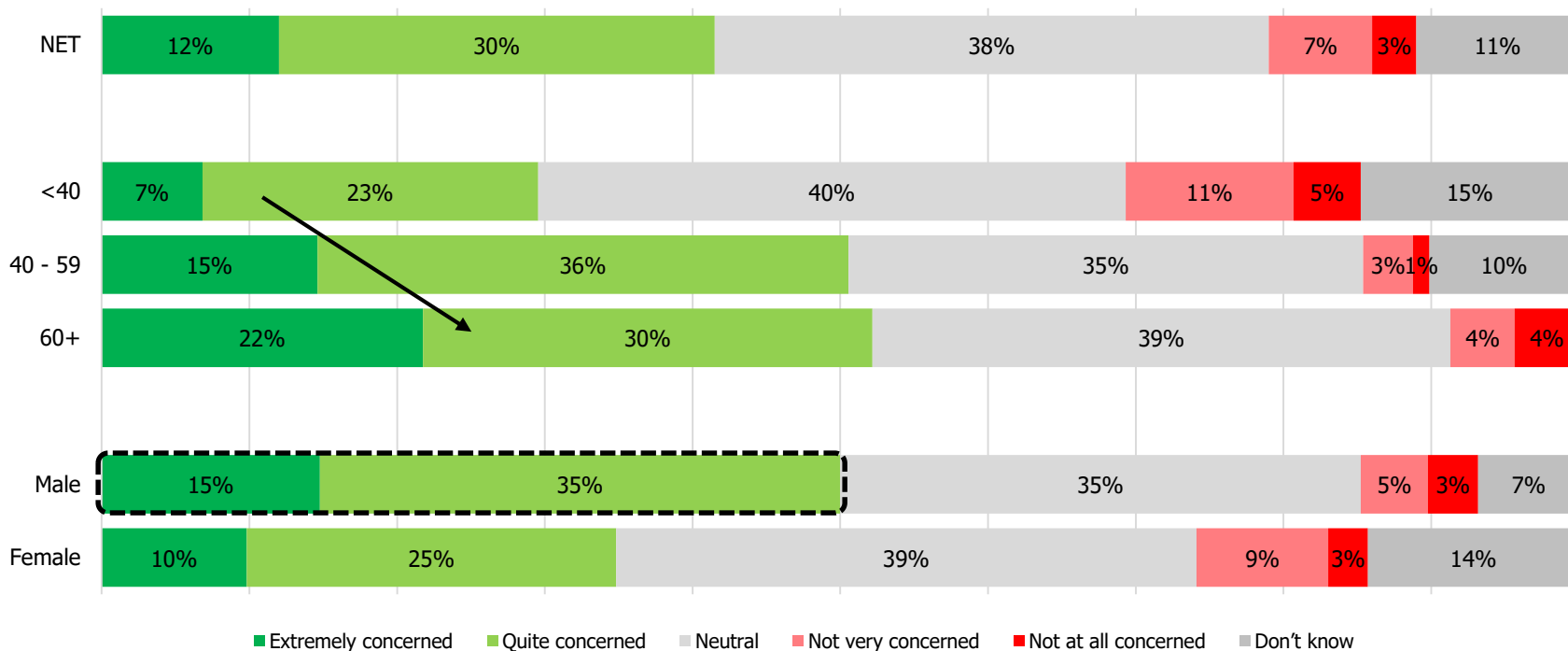
54% **None of these** would negatively impact my experience

# **Biosecurity awareness and messaging**

Respondents were only slightly more concerned [Concerned NET=42%] compared to feeling neutral [38%] about the risk of themselves or other visitors introducing pests and diseases such as phylloxera into wine regions. Males were more concerned with the introduction of pests and diseases such as phylloxera than females. The older age groups were also more concerned compared with the younger age groups.

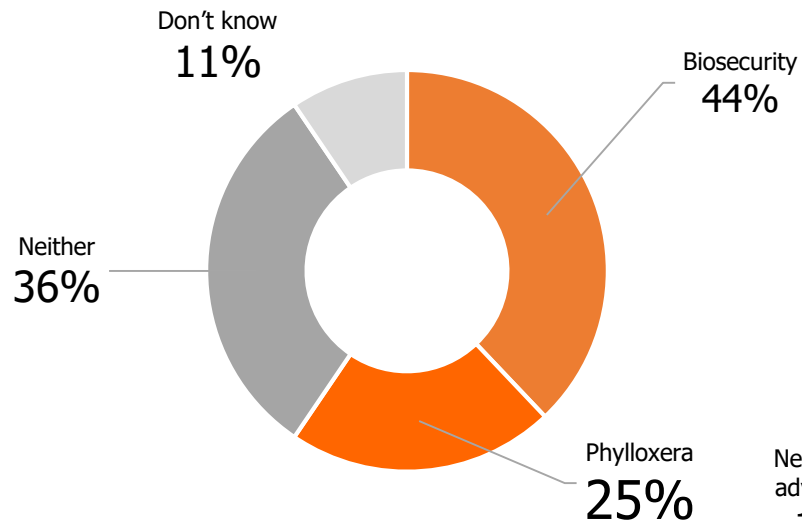
## Q21. How concerned are you the risk of visitors such as yourself introducing pests and disease such as phylloxera into South Australian wine regions?

[n=200]



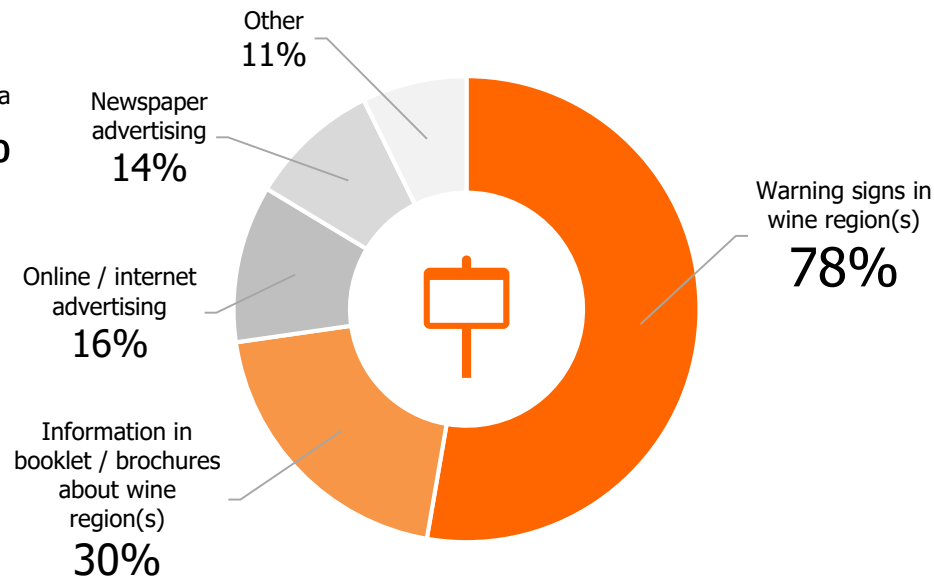
**Q18. Had you heard either of the following terms before today?**

[n=200]



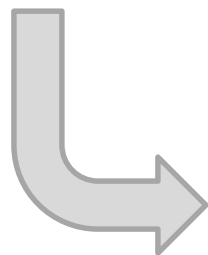
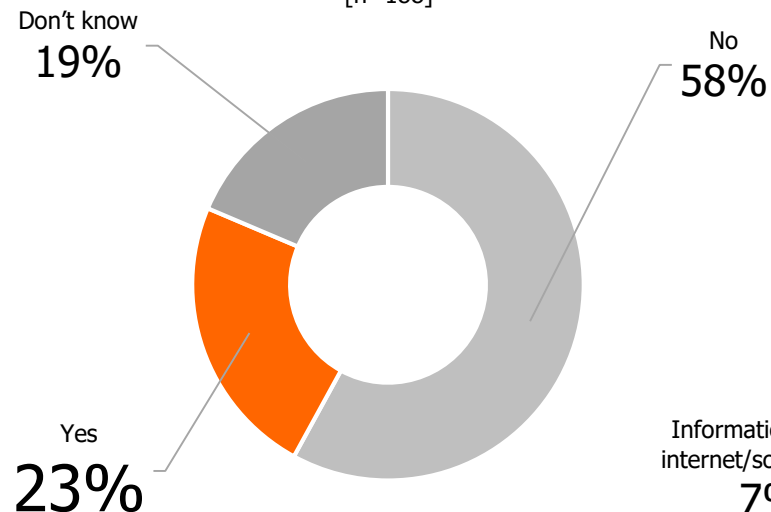
**Q20. Where did you see or hear it?**

[n=37]



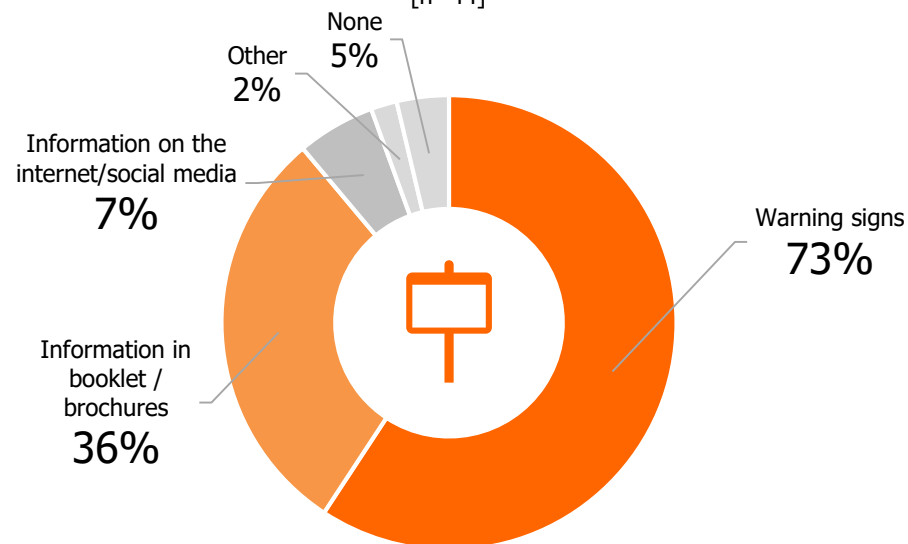
**Q14. When visiting South Australian wine regions did you notice any information about not walking through the vines to protect them from pests and diseases such as phylloxera?**

[n=188]



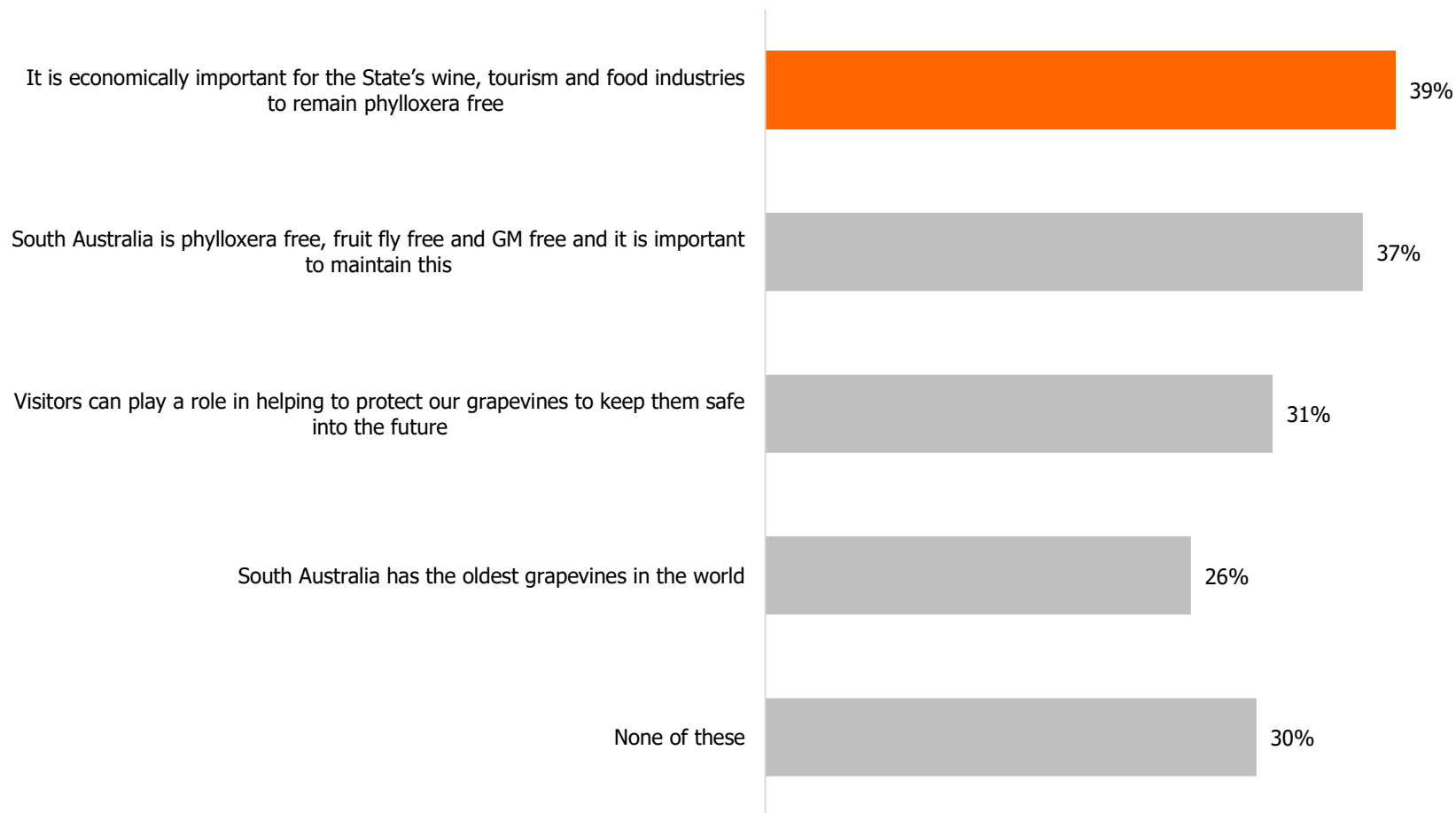
**Q16. What information did you see?**

[n=44]



## Q25. Which, if any, of the following facts were you aware of before today?

[n=200]

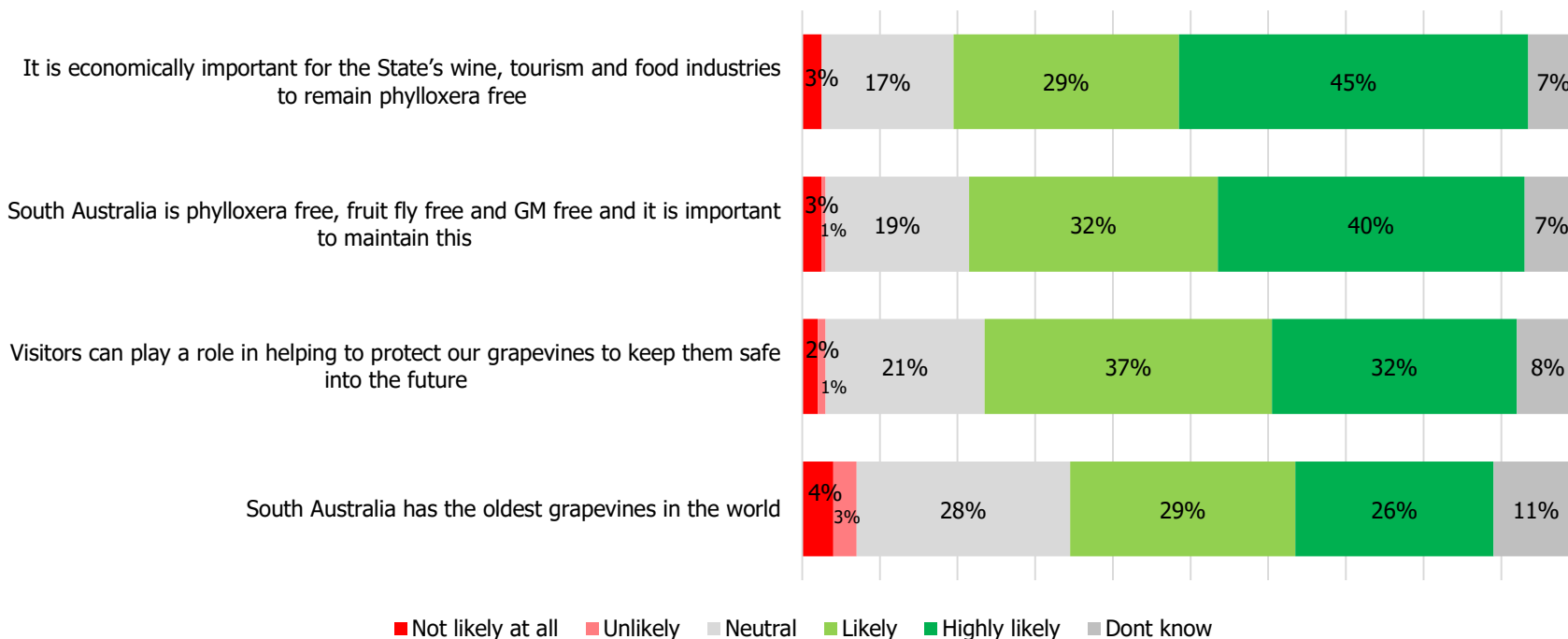




A majority of respondents felt the economic importance of the State's wine, tourism and food industries would encourage them to protect the wine sector from pests and diseases [Likely NET=74%]. South Australia having the oldest grapevines in the world was perceived as the least likely fact to connect with participants [Unlikely NET=7%].

## Q26. How likely are the following facts to encourage you to think about the risks associated with protecting our wine sector from pests and diseases?

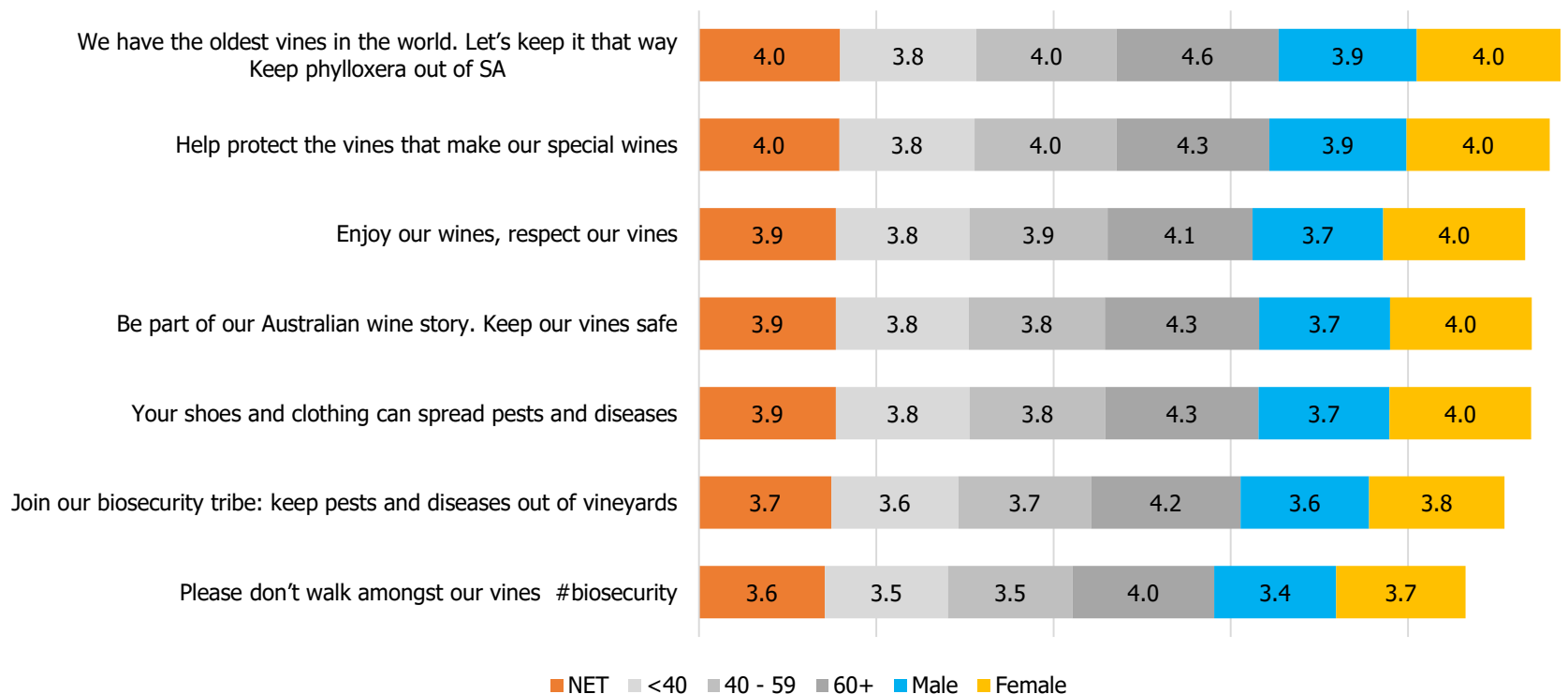
[n=200]



On average the older age group felt a greater impact with the statements compared to the under 40 year old age group. Females also felt a greater impact with the statements compared to males.

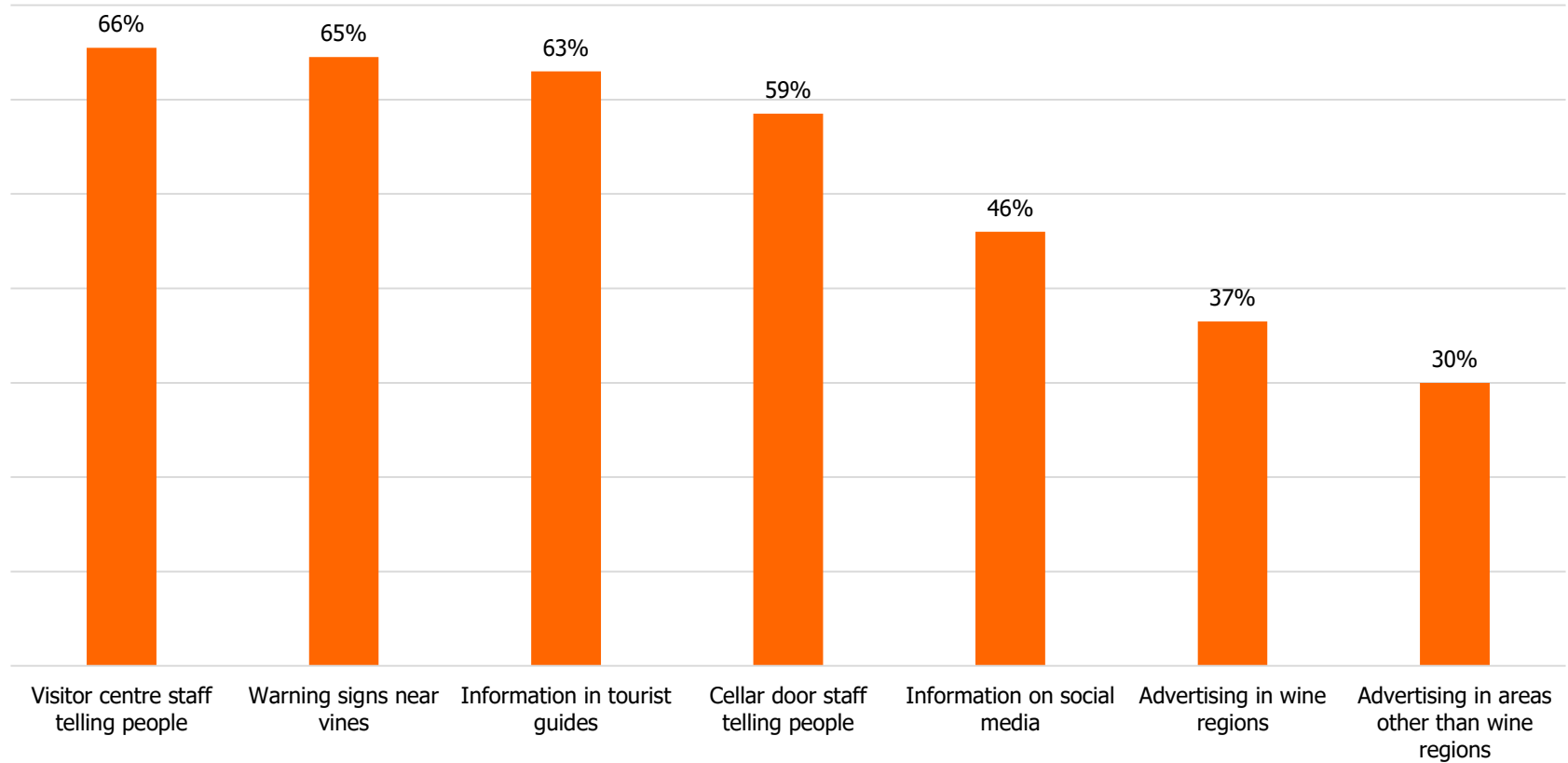
**Q28. What impact would each of the following statements have on you, in terms of communicating the risks of spreading pests and diseases in vineyards and what you can do to help?**

[n=200]



**Q27. What is the best way to communicate with visitors about protecting our wine sector from introduced pests and diseases?**

[n=200]



# Appendices

Quantitative findings

Respondent profile

Questionnaire

Desk research

References

In-depth interviews

Discussion guide

**Q6. Which of the following have you done in the last 12 months?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Day trip within South Australia	71%	74%	71%	61%	75%	68%	79%
Longer stay within South Australia	53%	53%	55%	39%	57%	49%	59%
Travelled interstate	63%	68%	57%	65%	68%	59%	66%
Consumed wine made in South Australia	62%	57%	63%	74%	66%	58%	67%
Travelled overseas	38%	41%	38%	26%	38%	38%	38%
Column n	200	88	89	23	88	112	165

The majority of respondents had done a day trip within South Australia within the last 12 months [71%]. Younger respondents were more likely to do a day trip or travel overseas compared to the older age groups who were more likely to consume wine made in South Australia.

### Q7. Have you ever visited any of the following South Australian wine regions?

[n=200]

Column %		Row n
Adelaide Hills	<b>67%</b>	133
Barossa Valley	<b>73%</b>	146
Clare Valley	<b>57%</b>	114
McLaren Vale	<b>63%</b>	125
Currency Creek	22%	43
Coonawarra	29%	58
Limestone Coast	28%	56
Riverland	41%	82
Langhorne Creek	23%	46
Kangaroo Island	32%	64
Eden Valley	19%	37
Mt Bensen	2%	3
Robe	20%	39
Mt Gambier	37%	73
Padthaway	17%	33
Southern Fleurieu	34%	67
Wrattonbully	2%	4
None of the above	6%	12

### Q8. Which of these have you visited over the past 12 months?

[n=188]

Column %		Row n
Adelaide Hills	<b>39%</b>	71
Barossa Valley	<b>48%</b>	87
Clare Valley	<b>21%</b>	37
McLaren Vale	<b>31%</b>	56
Currency Creek	6%	10
Coonawarra	7%	12
Limestone Coast	9%	16
Riverland	13%	24
Langhorne Creek	9%	16
Kangaroo Island	7%	13
Eden Valley	3%	6
Robe	2%	4
Mt Gambier	12%	21
Padthaway	3%	6
Southern Fleurieu	13%	23
Southern Flinders	4%	7
Wrattonbully	1%	1
None of the above	13%	23

**Q9. Which months of the year did you visit these wine regions in South Australia over the past 12 months?**  
[n=188]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
January	19%	20%	22%	5%	19%	19%	21%	36
February	18%	18%	20%	5%	20%	15%	20%	33
March	<b>23%</b>	23%	27%	10%	26%	21%	26%	44
April	<b>22%</b>	24%	22%	14%	20%	24%	25%	42
May	18%	15%	25%	5%	15%	20%	21%	34
June	<b>24%</b>	21%	29%	14%	21%	26%	27%	45
July	19%	18%	21%	10%	17%	20%	21%	35
August	15%	15%	18%	10%	13%	17%	17%	29
September	13%	11%	18%	5%	13%	13%	15%	25
October	14%	13%	16%	5%	17%	12%	15%	26
November	11%	6%	16%	10%	14%	9%	13%	21
December	12%	10%	16%	0%	10%	13%	13%	22
Don't know	19%	18%	13%	<b>48%</b>	23%	16%	11%	32
Column n	188	82	85	21	84	104	165	

**Q10. How would you describe an ideal day visiting a wine region? [Please specify]**  
*Coded as multiple response*  
 [n=200]

Column %		Row n
Wine/wineries	26%	52
Food	15%	29
Weather	14%	28
Relaxing	7%	13
Enjoyable nice day	8%	15
People visiting with	4%	8
Environment	4%	8
Organised / not the driver	2%	3
Quality staff	2%	3
Time of year	5%	10
Don't know	42%	83
Column n	200	

**Quotes**

- "Tasting wine and exploring the area."
- "Good wine, good food, good friends."
- "Warm sunny day with loved ones and I am not the designated driver."
- "Walking around vineyard and learning how to make wine."
- "Being chauffeured around."
- "Relaxed day of wine tasting with a meal."
- "Sightseeing and tasting with a great experience."
- "Sunshine, character wineries, tasting and buying good wines, platter of local food for lunch, friendly staff."
- "Lunch at a cafe serving local produce and visiting tourist attractions."
- "Admiring the vineyards."



**Q11. When visiting South Australian wine regions, which of the following would you expect to do?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Have lunch or dinner at a restaurant/ cellar door/ café/ pub	72%	61%	79%	83%	67%	75%	73%
Visit cellar doors	69%	60%	76%	70%	63%	73%	71%
Visit a market	43%	32%	47%	65%	43%	42%	45%
Take photo amongst the vines	37%	44%	33%	26%	28%	44%	40%
Walk near vineyards	34%	43%	28%	22%	32%	36%	36%
Walk through vineyards	21%	32%	16%	0%	16%	25%	21%
Use a bike or walking trail in the region	20%	20%	21%	13%	23%	18%	20%
Have a picnic amongst the vines	17%	18%	15%	22%	10%	22%	16%
Pick grapes from vineyards / physically touch the vines	11%	18%	6%	0%	13%	9%	12%
Other [please specify]	3%	2%	4%	0%	5%	2%	4%
Don't know	8%	8%	7%	9%	7%	8%	6%
Column n	200	88	89	23	88	112	165
<b>Other:</b> <ul style="list-style-type: none"> <li>▪ Drink wine</li> <li>▪ Talk to people closely associated with wine production, i.e. not just cellar door sales assistants</li> <li>▪ Food and Wine tastings at wineries</li> <li>▪ Picnic at local park</li> <li>▪ Bus tour</li> <li>▪ Visit parks</li> </ul>							

**Q12. Would any of the following negatively impact your experience when visiting wine regions in South Australia?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Not allowed to take photos amongst the vines	17%	18%	16%	17%	19%	15%	19%
Needing to wash shoes in disinfectant before and after any vineyard tours or walks	15%	16%	12%	22%	10%	19%	15%
Not allowed to walk near vineyards	13%	15%	12%	9%	15%	12%	14%
Not allowed to walk through vineyards	13%	20%	8%	4%	13%	13%	15%
Needing to wear supplied gum boots before and after any vineyard tours or walks	13%	10%	15%	17%	7%	18%	13%
Not allowed to have a picnic amongst the vines	11%	9%	11%	13%	15%	7%	12%
Not allowed to pick grapes from vineyards / physically touch the vines	9%	8%	10%	4%	11%	6%	9%
Don't know	8%	14%	3%	0%	6%	9%	5%
None of these would negatively impact my experience	54%	42%	62%	65%	57%	51%	53%
Column n	200	88	89	23	88	112	165

Most did not find any of the suggested measures would impact their experience. Of those who did, not being allowed to take photos amongst the vines was the most significant [17%]. A fifth of the under 40 year old's would be impacted by not being allowed to walk through the vineyards. The 60+ year old's do not want to have to change or clean their shoes.

**Q13. Have you visited wine regions in any of the following areas over the past 12 months?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Victoria	14%	17%	13%	4%	11%	16%	15%	28
Western Australia	4%	6%	2%	0%	5%	3%	4%	12
New South Wales	6%	9%	3%	4%	7%	5%	6%	9
Tasmania	5%	6%	4%	0%	2%	6%	5%	7
Queensland	4%	5%	2%	4%	3%	4%	4%	7
Overseas	4%	7%	1%	4%	3%	4%	2%	8
Have not visited any	77%	69%	80%	91%	76%	77%	75%	153
Column n	200	88	89	23	88	112	165	

Most respondents had not visited a wine region outside South Australia [77%]. The older the respondent, the less likely they were to visit regions outside South Australia. Of those who did visit a wine region outside of South Australia, Victoria was the most common destination [14%].

**Q14. When visiting South Australian wine regions did you notice any information about not walking through the vines to protect them from pests and diseases such as phylloxera? This might be warning signs, information in brochures or other signage.**

[n=188]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Yes	23%	27%	20%	24%	29%	19%	25%	44
No	58%	55%	61%	57%	51%	63%	58%	109
Don't know	19%	18%	19%	19%	20%	17%	17%	35
Column n	188	82	85	21	84	104	188	

**Q15. Which regions did you see information or signage about protecting the vines from pests and diseases such as phylloxera?**

[n=44]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Adelaide Hills	23%	36%	12%	0%	13%	35%	21%	10
Barossa Valley	36%	41%	29%	40%	29%	45%	36%	16
Clare Valley	16%	23%	6%	20%	17%	15%	17%	7
McClaren Vale	23%	5%	41%	40%	17%	30%	24%	10
Currency Creek	9%	9%	12%	0%	13%	5%	10%	4
Coonawarra	5%	0%	12%	0%	0%	10%	5%	2
Limestone Coast	7%	5%	12%	0%	8%	5%	7%	3
Riverland	18%	9%	29%	20%	21%	15%	19%	8
Langhorne Creek	7%	5%	12%	0%	8%	5%	7%	3
Kangaroo Island	2%	0%	6%	0%	0%	5%	2%	1
Eden Valley	5%	0%	12%	0%	0%	10%	5%	2
Robe	5%	5%	6%	0%	0%	10%	5%	2
Mt Gambier	7%	9%	6%	0%	8%	5%	7%	3
Padthaway	7%	5%	12%	0%	4%	10%	7%	3
Southern Fleurieu	11%	5%	18%	20%	13%	10%	12%	5
None	7%	14%	0%	0%	0%	15%	5%	3
Column n	44	22	17	5	24	20	42	

## Q16. What information did you see?

[n=44]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Warning signs	73%	77%	71%	60%	67%	80%	71%	32
Information in booklet / brochures	36%	36%	24%	80%	50%	20%	36%	16
Information on the internet/social media	7%	9%	6%	0%	4%	10%	7%	3
Other [please specify]	2%	5%	0%	0%	4%	0%	2%	1
None of the above	5%	5%	6%	0%	4%	5%	5%	2
Column n	44	22	17	5	24	20	42	

**Other:**

- Verbal info from brother in law

**17 What messages do you recall from the information you saw**  
**[Please specify]**

- A sign to prohibit entry without authority
- Avoid walking off path
- Do not bring grape material into the area
- Don't bring fruit into the Riverland
- Don't spread the disease
- Fruit fly
- Great place visit
- Keep out of this area
- Keep SA phylloxera free
- No recollection
- No walking through the vineyards
- Please treasure
- Warning - Do not walk in here as there is a risk of pest infection
- Wash shoes

**Q18. Had you heard either of the following terms before today?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Phylloxera	25%	16%	27%	52%	31%	21%	26%	50
Biosecurity	44%	33%	51%	57%	52%	37%	46%	87
Neither	36%	41%	36%	17%	28%	42%	34%	72
Don't know	11%	16%	6%	9%	10%	11%	10%	21
Column n	200	88	89	23	88	112	165	

A quarter of respondents had heard of phylloxera [25%] and almost half of the respondents [44%] had heard of the term biosecurity. The older the respondent the more likely they were to have heard of the terms. Males were more aware of the terms compared to females.

**Q19. Over the past 12 months, have you seen or heard information, signage or advertising about the risks of introducing pests and diseases such as phylloxera into South Australian wine regions?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Yes	19%	18%	18%	22%	22%	16%	21%
No	68%	64%	72%	65%	63%	71%	64%
Don't know	14%	18%	10%	13%	16%	13%	15%
Column n	200	88	89	23	88	112	165



**Q20. Where did you see or hear it?**  
[n=37]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region	Row n
Warning signs in wine region(s)	78%	75%	88%	60%	84%	72%	83%	29
Information in booklet / brochures about wine region(s)	30%	31%	19%	60%	42%	17%	31%	11
Newspaper advertising	14%	31%	0%	0%	16%	11%	14%	5
Online / internet advertising	16%	25%	6%	20%	16%	17%	17%	6
Other [please specify]	11%	13%	6%	20%	0%	22%	6%	4
Column n	37	16	16	5	19	18	35	
<b>Other:</b> <ul style="list-style-type: none"> <li>▪ Airport</li> <li>▪ TV</li> <li>▪ Friends</li> </ul>								

**Q21. How concerned are you of the risk of visitors such as yourself introducing pests and disease such as phylloxera into South Australian wine regions**  
[n=200]

<b>Column %</b>	<b>NET</b>	<b>&lt;40</b>	<b>40 - 59</b>	<b>60+</b>	<b>Male</b>	<b>Female</b>	<b>Visited SA wine region</b>
Extremely concerned	12%	7%	15%	22%	15%	10%	13%
Quite concerned	30%	23%	36%	30%	35%	25%	33%
Neutral	38%	40%	35%	39%	35%	39%	36%
Not very concerned	7%	11%	3%	4%	5%	9%	7%
Not at all concerned	3%	5%	1%	4%	3%	3%	2%
Don't know	11%	15%	10%	0%	7%	14%	8%
Average	2.5	2.8	2.3	2.4	2.4	2.6	2.5
Column n	200	88	89	23	88	112	165

## Why are you concerned [Please specify]

- I want to protect a very valuable industry for this state and am aware of the devastation caused in the eastern states a century ago
- I would hate to be responsible for introducing a disease
- Everyone needs to follow the rules or signs posted at these premises even if it's only as a precaution because we never know what we may and inadvertently stepped in
- Don't want damage to wine industry
- Health risk
- Could cause devastation for plants
- Could contaminate your wine and grapes
- Don't want to cause harm
- Because it affects us all from jobs, export and local businesses
- Do not want to spread the disease around and lose valuable crops
- Disastrous impact on the industry
- We don't want the disease here
- I like wine, it could damage or kill the vines = no wine
- We should protect the environment
- Would ruin the grapes I consume
- Generally to make sure our wines are world class
- Wouldn't want to see our wine regions compromised
- It will have a negative impact on South Australia
- Don't want it to happen
- Would damage a major industry in South Australia
- I don't want to damage the industry
- Impact on wine industry therefore economy
- Don't want any pests/diseases within South Australian would ruin the industry
- Impact on wine growing industry
- Damage they could do to the industry
- The wine industry is extremely competitive, any reduction in productivity or quality, or increase in cost of production due to an introduced disease would have a damaging effect on an iconic state asset
- It could destroy the vines
- I don't want the wine region compromised mainly for economic reasons for SA
- Impact on SA's pristine wine reputation from infestation of phylloxera
- They can harm to the health of the people who work in vineyards
- We need our grapes
- Would ruin our wine industry
- Bad for grape growers
- Someone may do the wrong thing
- It would damage the industry
- Impact on wineries
- It would be terrible for this to happen. We have some of the best wines in the world and we should not allow any negative risks to our wine regions.
- We don't want any disease period that will cause harm
- Don't want to damage a valuable industry
- Would ruin the industry in SA
- Do not want this disease in SA
- I understand the impact it would have on the industry (killing vines, affecting transport of cuttings for propagation).
- Spread of disease
- It could adversely affect our premium wine state status
- It could damage our crops
- Wines are really important for the state economy
- Loss of crops
- The resource of wine is good for SA and we need to protect it
- It's a threat to our wine industry
- Damaging the wineries damages both the produce and the ability for the produce to be Introduced into the economy. Wine is a big draw for South Australia, it would be a huge blow to lose it
- Could destroy vines
- It can be a threat to our farming
- Might spoil our grapes
- Destroy the region
- Can destroy industry
- They could cause the wineries to close down, which are the main attractions for their regions
- Disease can destroy the industry
- Don't want to lose my wine
- Risk of spreading diseases
- Kill of the industry
- Would impact the crop
- I like to think I understand the fragile nature of every environment
- Is a valuable industry
- Due to the quality of our wine.
- Fruit fly
- The pests and diseases introduced can cause harm to the industry
- Could decimate an entire industry

**Why are you NOT concerned [Please specify]**

- Because access is already limited
- Don't believe I would be carrying disease
- Don't know enough about it
- Don't know very much about it
- Haven't been advised of the implications
- I'm sure they have it under control, can't be as bad as when the people of the NT had to cut all their banana trees down
- It didn't seem like such a big problem to me
- Just doesn't bother me
- Just follow the instructions given and you'll be fine
- SA wines are updated no risks
- Trust the winery wouldn't put us in danger

**Q25. Which, if any, of the following facts were you aware of before today?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
It is economically important for the State's wine, tourism and food industries to remain phylloxera free	39%	23%	47%	65%	36%	40%	40%
South Australia is phylloxera free, fruit fly free and GM free and it is important to maintain this	37%	24%	42%	65%	41%	33%	38%
Visitors can play a role in helping to protect our grapevines to keep them safe into the future	31%	34%	24%	48%	31%	31%	32%
South Australia has the oldest grapevines in the world	26%	30%	22%	26%	25%	27%	28%
None of these	30%	35%	29%	13%	27%	32%	25%
Column n	200	88	89	23	88	112	165

**Q26. How likely are the following facts to encourage you to think about the risks associated with protecting our wine sector from pests and diseases?**  
[n=200]

<b>Average</b>	<b>NET</b>	<b>&lt;40</b>	<b>40 - 59</b>	<b>60+</b>	<b>Male</b>	<b>Female</b>	<b>Visited SA wine region</b>
It is economically important for the State's wine, tourism and food industries to remain phylloxera free	4.2	3.9	4.4	4.7	4.3	4.1	4.2
South Australia is phylloxera free, fruit fly free and GM free and it is important to maintain this	4.1	3.8	4.2	4.8	4.2	4.1	4.1
Visitors can play a role in helping to protect our grapevines to keep them safe into the future	4.0	3.8	4.1	4.6	4.1	4.0	4.0
South Australia has the oldest grapevines in the world	3.8	3.6	3.9	4.3	3.8	3.8	3.8
Column n	200	88	89	23	88	112	165

The older the respondent, the more they were encouraged to think about the associated risks after reading the facts .

# Q27. What is the best way to communicate with visitors about protecting our wine sector from introduced pests and diseases?

[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Warning signs near vines	65%	50%	71%	96%	65%	64%	67%
Information in tourist guides	63%	50%	69%	91%	63%	63%	66%
Visitor centre staff telling people	66%	53%	72%	87%	61%	69%	67%
Cellar door staff telling people	59%	45%	66%	78%	57%	60%	62%
Advertising in wine regions [specify how]	37%	31%	42%	39%	32%	40%	40%
Advertising in areas other than wine regions [specify how]	30%	26%	33%	35%	26%	33%	32%
Information on social media	46%	43%	48%	48%	43%	48%	47%
Other [please specify]	4%	1%	4%	9%	6%	2%	3%
Don't know	11%	17%	8%	0%	13%	10%	8%
Column n	200	88	89	23	88	112	165

## Other:

- Advertising on the side of cross rural transportation trucks / trailers
- Environmental controls; gates and fences around visitor carparks, cellar buildings prevent easy or thoughtless access to sensitive areas
- Everybody reminding each other about this, or even perhaps a special toast and giving thanks at wine tastings about how lucky we are to be free of these diseases.
- in tourist brochures
- Small signage throughout the wine areas in bottle shops. Samples of the pest and diseases shown to tourists at the wineries. Including the information into the advertising already on TV about our beautiful wineries.
- TV & Radio

**Q28. What impact would each of the following statements have on you, in terms of communicating the risks of spreading pests and diseases in vineyards and what you can do to help?**  
[n=200]

<b>Average</b>	<b>NET</b>	<b>&lt;40</b>	<b>40 - 59</b>	<b>60+</b>	<b>Male</b>	<b>Female</b>	<b>Visited SA wine region</b>
We have the oldest vines in the world Let's keep it that way Keep phylloxera out of SA	4.0	3.8	4.0	4.6	3.9	4.0	4.0
Help protect the vines that make our special wines	4.0	3.8	4.0	4.3	3.9	4.0	4.0
Enjoy our wines, respect our vines	3.9	3.8	3.9	4.1	3.7	4.0	3.9
Be part of our Australian wine story Keep our vines safe	3.9	3.8	3.8	4.3	3.7	4.0	3.9
Your shoes and clothing can spread pests and diseases	3.9	3.8	3.8	4.3	3.7	4.0	3.9
Join our biosecurity tribe: keep pests and diseases out of vineyards	3.7	3.6	3.7	4.2	3.6	3.8	3.8
Please don't walk amongst our vines #biosecurity	3.6	3.5	3.5	4.0	3.4	3.7	3.6
Column n	200	88	89	23	88	112	165



**Q29. How are you most likely to travel to a wine region?**  
[n=200]

Column %	NET	<40	40 - 59	60+	Male	Female	Visited SA wine region
Own car	73%	59%	81%	91%	77%	69%	76%
Friend's car	10%	11%	10%	0%	7%	12%	9%
Tour Bus	6%	8%	3%	4%	3%	7%	5%
Rental Car	3%	5%	1%	0%	2%	3%	3%
Public transport	2%	3%	1%	0%	2%	2%	2%
Uber	2%	3%	0%	0%	1%	2%	2%
Coach	2%	1%	1%	4%	1%	2%	1%
Taxi	0%	0%	0%	0%	0%	0%	0%
Bike	0%	0%	0%	0%	0%	0%	0%
Other [please specify]	1%	1%	0%	0%	1%	0%	0%
Don't know	5%	8%	2%	0%	5%	4%	2%
Column n	200	88	89	23	88	112	165

# Respondent Profile

Gender		
Column %		n
Male	44%	88
Female	56%	112
NET	100%	200

Age		
Column %		n
18-24	8%	16
25-29	13%	25
30-34	14%	27
35-39	10%	20
40-44	7%	14
45-49	14%	28
50-54	12%	23
55-59	12%	24
60+	12%	23
NET	100%	401

Household composition		
Column %		n
Young single person living alone	10%	19
Young couple, living separately	1%	2
Young couple, living together	12%	23
Young family, with all children primary school aged or younger	18%	35
Middle family, with child still living at home high school aged or older	12%	24
Mature family, with all children living at home older than high school age	13%	26
Mature couple	23%	46
Mature person	13%	25
NET	100%	401

Regions		
Column %		n
Metropolitan Adelaide	82%	164
Regional / Rural South Australia	18%	36
NET		200

Do you work in the wine industry or an associate industry? [n=200]	
Column %	n
Yes	7
No	193
Which regions? [n=7]	
Adelaide Hills	2
Barossa	1
Mt Gambier	1
Other [please specify]	2
Not employed in wine industry	1
<b>Other:</b> <ul style="list-style-type: none"> <li>▪ CBD</li> <li>▪ Metropolitan Adelaide</li> </ul>	



## Vinehealth Biosecurity questionnaire [P/N 170802]

**M = Multiple Response**

**S = Single Response**

1. Meta info
2. Embedded data
3. Your gender: **S**
  - 1 Male
  - 2 Female
4. Your age range: **S**
  - 1 18-24
  - 2 25-29
  - 3 30-34
  - 4 35-39
  - 5 40-44
  - 6 45-49
  - 7 50-54
  - 8 55-59
  - 9 60+
  - 10 Refused
5. Which best describes the area where you live?
  - 1 Metropolitan Adelaide – North
  - 2 Metropolitan Adelaide – South
  - 3 Metropolitan Adelaide – East
  - 4 Metropolitan Adelaide – West
  - 5 Metropolitan Adelaide – Central
  - 6 Adelaide Hills
  - 7 Regional / Rural South Australia
6. Which of the following have you done in the last 12 months?
  - 1 Day trip within South Australia
  - 2 Longer stay within South Australia
  - 3 Travelled interstate
  - 4 Travelled overseas
  - 5 Consumed wine made in South Australia
  - 6 None of the above [Terminate]

Square Holes Pty Ltd



7. Have you ever visited any of the following South Australian wine regions? This may be for any reason including visiting wine regions, a quick stop while passing through to elsewhere, day trip or longer stay in the area. **M Rotate**

- |                    |                      |
|--------------------|----------------------|
| 1 Adelaide Hills   | 11 Eden Valley       |
| 2 Barossa Valley   | 12 Mt Bensen         |
| 3 Clare Valley     | 13 Robe              |
| 4 McLaren Vale     | 14 Mt Gambier        |
| 5 Currency Creek   | 15 Padthaway         |
| 6 Coonawarra       | 16 Southern Fleurieu |
| 7 Limestone Coast  | 17 Southern Flinders |
| 8 Riverland        | 18 Wrattenbully      |
| 9 Langhorne Creek  | 19 Other [specify]   |
| 10 Kangaroo Island | 20 None of the above |

**If region mentioned in Q7 ask in Q8-9, otherwise skip to Q10**

8. Which of these have you visited over the past 12 months?

- 1 Adelaide Hills
- 2 Barossa
- 3 Clare Valley
- 4 McLaren Vale
- 5 Currency Creek
- 6 Coonawarra
- 7 Limestone Coast
- 8 Riverland
- 9 Langhorne Creek
- 10 Kangaroo Island
- 11 Eden Valley
- 12 Mt Bensen
- 13 Robe
- 14 Mt Gambier
- 15 Padthaway
- 16 Southern Fleurieu
- 17 Southern Flinders
- 18 Wrattenbully
- 19 Other [specify]
- 20 None of the above

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If visited wine regions in Q8, ask Q9, otherwise skip to Q10 M

9. What month of the year did you visit these wine regions in South Australia over the past 12 months?

- 1 January
- 2 February
- 3 March
- 4 April
- 5 May
- 6 June
- 7 July
- 8 August
- 9 September
- 10 October
- 11 November
- 12 December
- 13 Don't know

Ask all:

10. How would you describe an ideal day visiting a wine region?

- 1 [please specify]
- 2 Don't know

11. When visiting South Australian wine regions, which of the following would you expect to do?

- 1 Visit cellar doors
- 2 Walk near vineyards
- 3 Walk through vineyards
- 4 Pick grapes from vineyards/ physically touch the vines
- 5 Take photo amongst the vines
- 6 Have a picnic amongst the vines
- 7 Have lunch or dinner at a restaurant/ cellar door/ café/ pub
- 8 Visit a market
- 9 Use a bike or walking trail in the region
- 10 Other [please specify]
- 11 Don't know

12. Would any of the following negatively impact your experience when visiting wine regions in South Australia?

- 1 Not allowed to walk near vineyards
- 2 Not allowed to walk through vineyards
- 3 Not allowed to pick grapes from vineyards/ physically touched the vines
- 4 Not allowed to take photos amongst the vines
- 5 Not allowed to have a picnic amongst the vines
- 6 Needing to wash shoes in disinfectant before and after any vineyard tours or walks
- 7 Needing to wear supplied gum boots before and after any vineyard tours or walks
- 8 Don't know
- 9 None of these would negatively impact my experience

Ask all:

13. Have you visited wine regions in any of the following areas over the past 12 months?

- 1 Victoria
- 2 Western Australia
- 3 New South Wales
- 4 Tasmania
- 5 Queensland
- 6 Overseas
- 7 Other [please specify]
- 8 Have not visited any

If visited wine region in Q7 ask Q14, otherwise go to 18 screener

14. When visiting South Australian wine regions did you notice any information about not walking through the vines to protect them from pests and diseases such as phylloxera? This might be warning signs, information in brochures or other signage.

- 1 Yes
- 2 No
- 3 Don't know



If 'yes' in Q14 continue, otherwise go to Q18

15. Which regions did you see information or signage about protecting the vines from pests and diseases such as phylloxera? (List those named in Q7)

- |                    |                      |
|--------------------|----------------------|
| 1 Adelaide Hills   | 11 Eden Valley       |
| 2 Barossa          | 12 Mt Bensen         |
| 3 Clare Valley     | 13 Robe              |
| 4 McLaren Vale     | 14 Mt Gambier        |
| 5 Currency Creek   | 15 Padthaway         |
| 6 Coonawarra       | 16 Southern Fleurieu |
| 7 Limestone Coast  | 17 Southern Flinders |
| 8 Riverland        | 18 Wrattenbully      |
| 9 Langhorne Creek  | 19 Other [specify]   |
| 10 Kangaroo Island | 20 None of the above |

16. What information did you see? (List those named in Q7)

- 1 Warning signs
- 2 Information in booklet / brochures
- 3 Information on the internet/social media
- 4 Other [specify]
- 5 None of the above

17. What messages do you recall from the information you saw?

- 1 [please specify]
- 2 Don't know

Ask all:

18. Had you heard either of the following terms before today?

- 1 Phylloxera
- 2 Biosecurity
- 3 Neither
- 4 Don't know

19. Over the past 12 months, have you seen or heard information, signage or advertising about the risks of introducing pests and diseases such as phylloxera into South Australian wine regions?

- 1 Yes
- 2 No
- 3 Don't know

If 'yes' in Q19 ask Q20, otherwise skip to Q21

20. Where did you see or hear it?

- 1 Warning signs in wine region(s)
- 2 Information in booklet / brochures about wine region(s)
- 3 Newspaper advertising
- 4 Online / internet advertising
- 5 Other [specify]
- 6 None of the above

Ask all:

21. How concerned are you the risk of visitors such as yourself introducing pests and disease such as phylloxera into South Australian wine regions?

- 1 Extremely concerned
- 2 Quite concerned
- 3 Neutral
- 4 Not very concerned
- 5 Not at all concerned
- 6 Don't know

If codes 1-2 in Q21

22. Why are you concerned

- 1 [please specify]
- 2 Don't know

If codes 4-5 in Q21

23. Why are you not concerned?

- 1 [please specify]
- 2 Don't know



25. Which, if any, of the following facts were you aware of before today?

- 1 South Australia has the oldest grapevines in the world
- 2 Visitors can play a role in helping to protect our grapevines to keep them safe into the future
- 3 South Australia is phylloxera free, fruit fly free and GM free and it is important to maintain this
- 4 It is economically important for the State's wine, tourism and food industries to remain phylloxera free
- 5 None of these

26. How likely are the following facts to encourage you to think about the risk associated with protecting our wine sector from pests and diseases?

	Not likely at all	Somewhat unlikely	Neutral	Somewhat likely	Very likely	Don't know
South Australia has the oldest grapevines in the world	1	2	3	4	5	6
Visitors can play a role in helping to protect our grapevines to keep them safe into the future	1	2	3	4	5	6
South Australia is phylloxera free, fruit fly free and GM free and it is important to maintain this	1	2	3	4	5	6
It is economically important for the State's wine, tourism and food industries to remain phylloxera free	1	2	3	4	5	6

27. What is the best way to communicate with visitors about protecting our wine sector from introduced pests and diseases?

- 1 Warning signs near vines
- 2 Information in tourist guides
- 3 Visitor centre staff telling people
- 4 Cellar door staff telling people
- 5 Advertising in wine regions (**specify how**)
- 6 Advertising in areas other than wine regions (**specify how**)
- 7 Information on social media
- 8 Other (**specify**)
- 9 Don't know

28. What impact would each of the following statements have on you, in terms of communicating the risks of spreading pests and diseases in vineyards and what you can do to help?

	No impact	Low impact	Neutral	Moderate impact	Large impact	Don't know
Please don't walk amongst our vines.	1	2	3	4	5	6
#biosecurity						
Your shoes and clothing can spread pests and diseases	1	2	3	4	5	6
Help protect the vines that make our special wines.	1	2	3	4	5	6
Enjoy our wines, respect our vines.	1	2	3	4	5	6
Be part of our Australian wine story. Keep our vines safe.	1	2	3	4	5	6
Join our biosecurity tribe: keep pests and diseases out of vineyards	1	2	3	4	5	6
We have the oldest vines in the world. Let's keep it that way. Keep phylloxera out of SA	1	2	3	4	5	6

Now just a couple of details about yourself for analysis purposes...

29. How are you most likely to travel to a wine region? **S**

- |                    |                             |
|--------------------|-----------------------------|
| 1 Own car          | 7 Tour Bus                  |
| 2 Friend's car     | 8 Coach                     |
| 3 Rental Car       | 9 Bike                      |
| 4 Public transport | 10 Other ( <b>specify</b> ) |
| 5 Uber             | 11 Don't know               |
| 6 Taxi             |                             |

30. Do you work in the wine industry or an associate industry? **If yes:** Which region?

- |                    |                                  |
|--------------------|----------------------------------|
| 1 Adelaide Hills   | 11 Eden Valley                   |
| 2 Barossa          | 12 Mt Benson                     |
| 3 Clare Valley     | 13 Robe                          |
| 4 McLaren Vale     | 14 Mt Gambier                    |
| 5 Currency Creek   | 15 Padthaway                     |
| 6 Coonawarra       | 16 Southern Fleurieu             |
| 7 Limestone Coast  | 17 Southern Flinders             |
| 8 Riverland        | 18 Wrattonbully                  |
| 9 Langhorne Creek  | 19 Other ( <b>specify</b> )      |
| 10 Kangaroo Island | 20 Not employed in wine industry |



31. Which of the following best describes your household composition?
- 1 Young single person living alone
  - 2 Young couple, living separately
  - 3 Young couple, living together
  - 4 Young family, with all children primary school aged or younger
  - 5 Middle family, with a high school aged child still living at home
  - 6 Mature family, with all children living at home older than high school age
  - 7 Mature couple living together
  - 8 Mature person

32. How many people aged 18 or over live in your household?

[specify number of people]

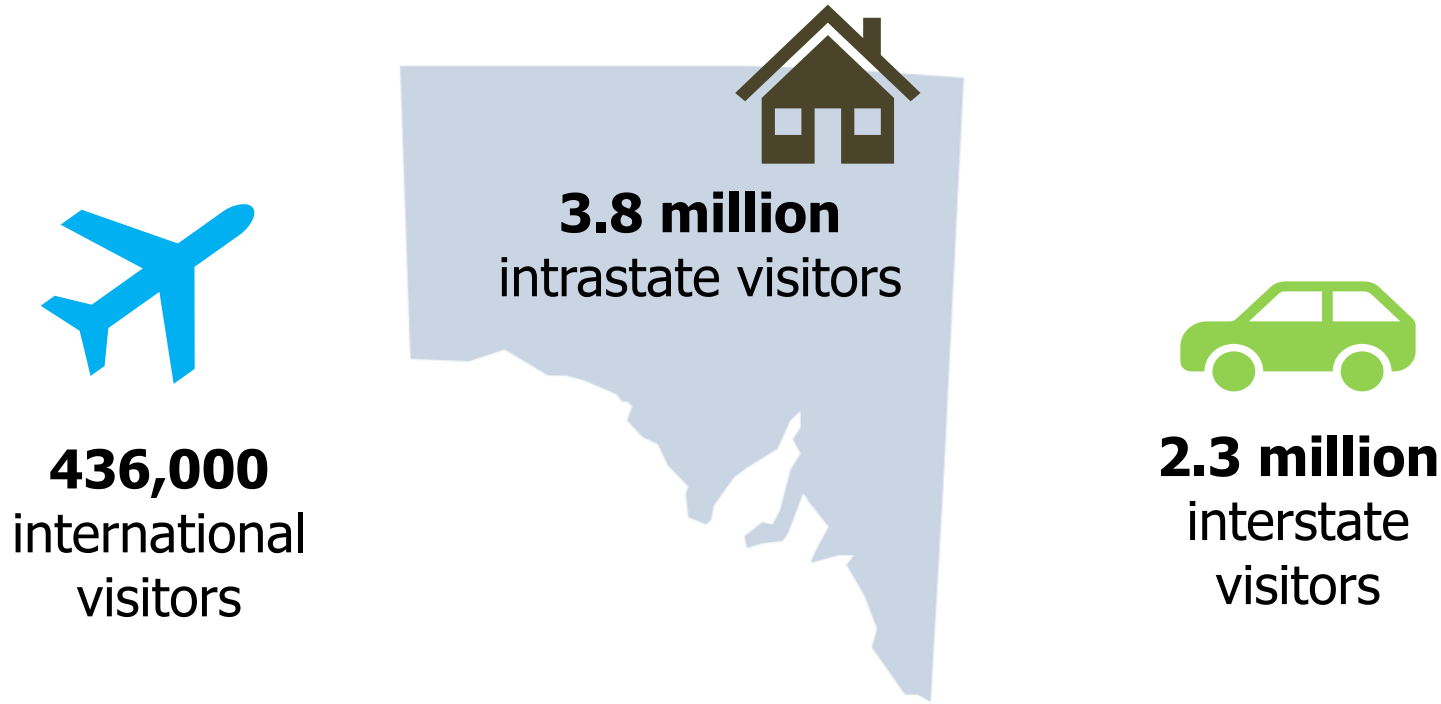
999 Don't know

33. postcode



# Desk research

# Who is visiting SA?



**93% Domestic Visitors**  
**7% International Visitors**

## 300% increase in Chinese booking for wine tours in Australia

### International Visitors to SA

Year Ending Mar 17



↑ 48%  
**50,000**  
China

↑ 19%  
**150,000**  
Total Asia

↑ 15%  
**33,000**  
Germany

↓ 0.1%  
**167,000**  
Total Europe

↓ 1.7%  
**65,000**  
UK



↑ 13%  
**51,000**  
USA

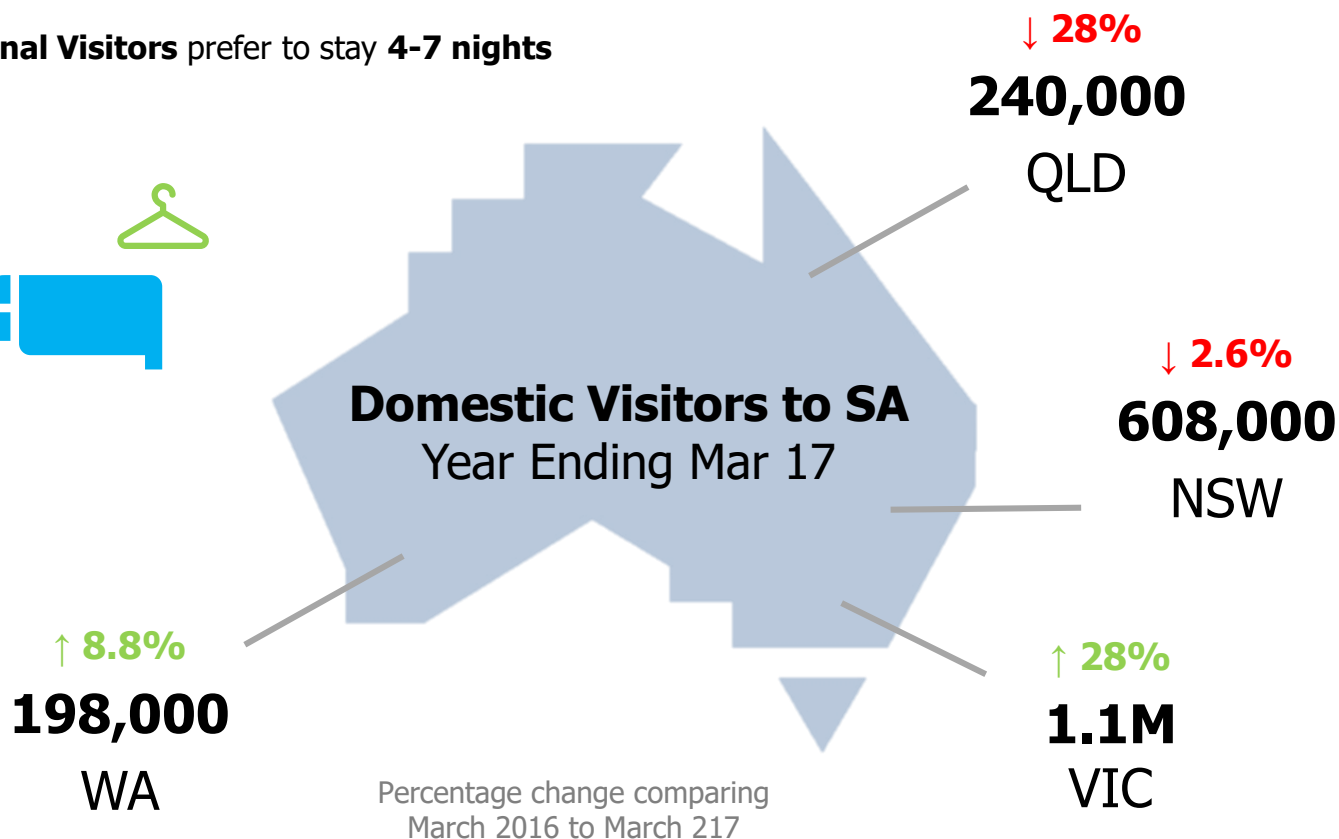
↓ 8.7%  
**37,000**  
NZ

Percentage change comparing  
March 2016 to March 2017

# Who is visiting SA?

**Domestic Visitors** are likely to stay **1-2 nights**

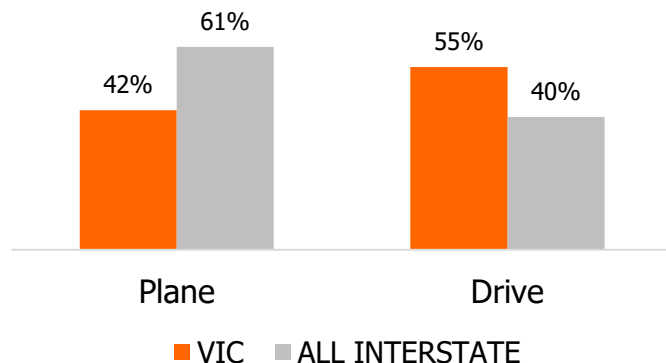
**International Visitors** prefer to stay **4-7 nights**



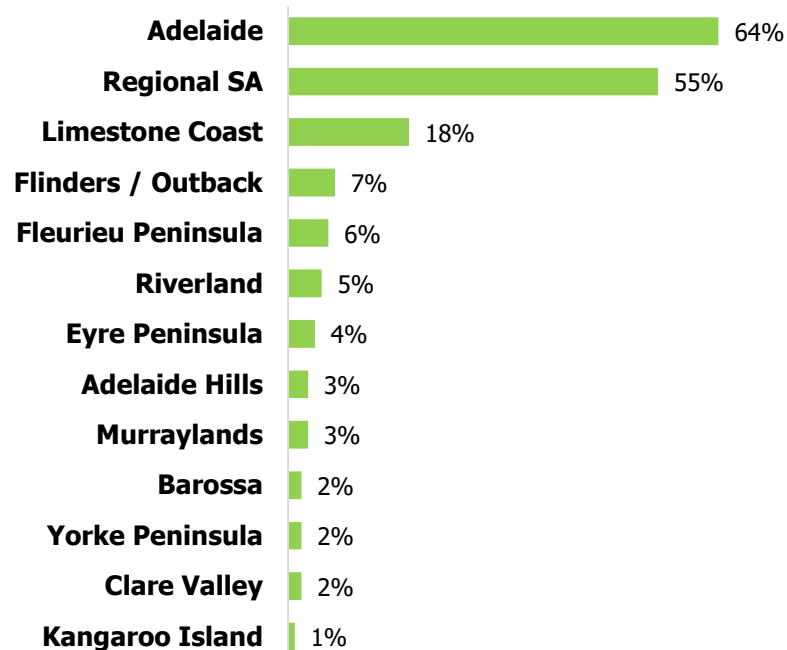
# Who is visiting SA? Victoria

Victorians make up **42% of interstate visitors.**

## Transport to SA



## Regions Visited

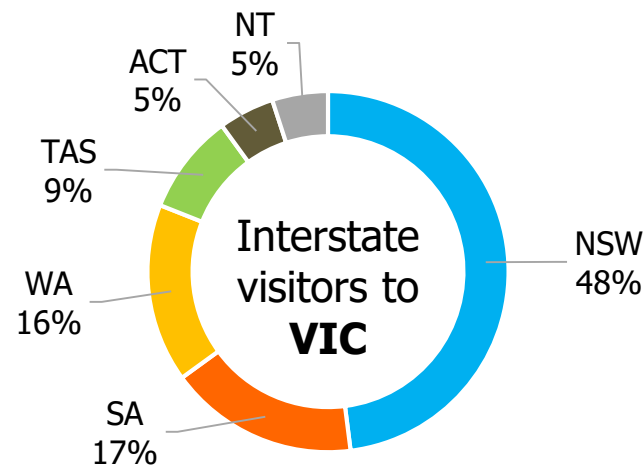


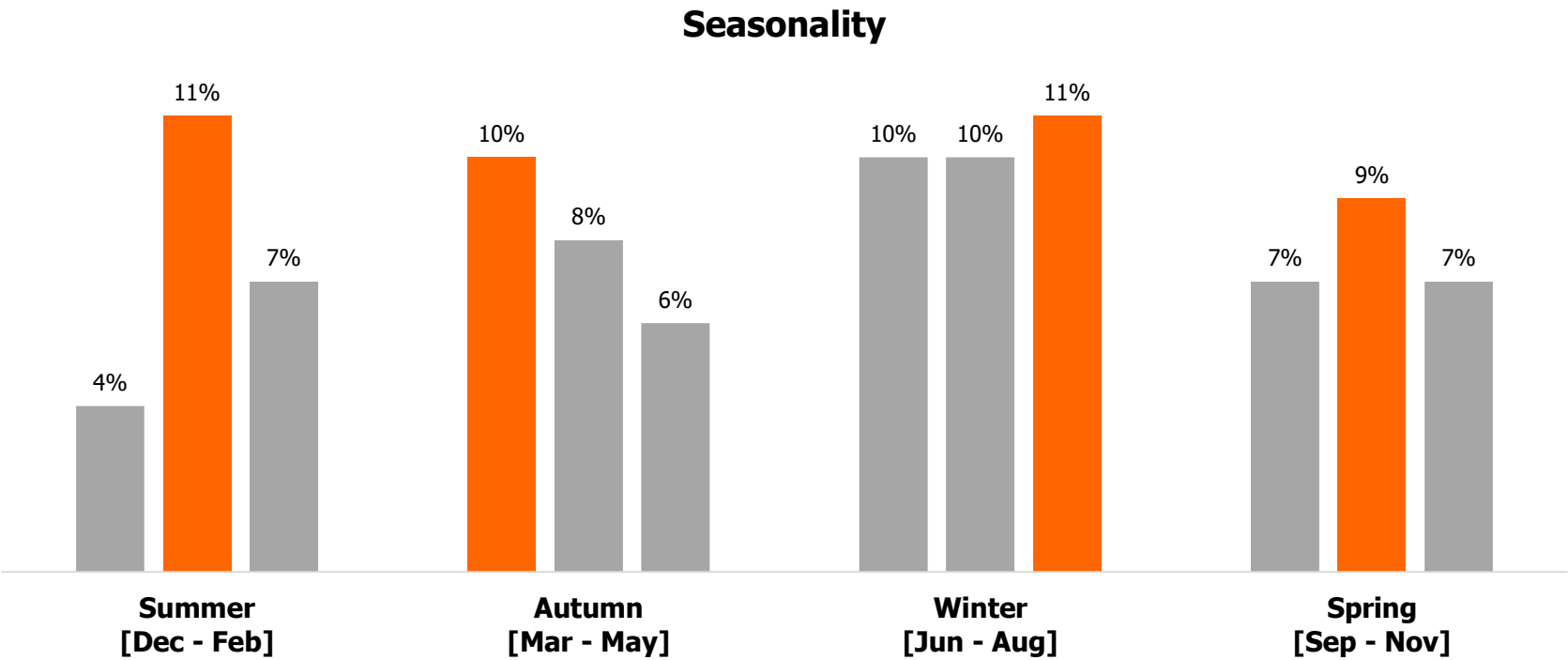
# South Australians visiting Victoria

Of the 1.9 million interstate overnight trips by South Australians, **53% were to Victoria.**

**1 million overnight visitors.**

**654,000** overnight trips were **to Melbourne**  
**407,000** overnight trips were **to regional Victoria**

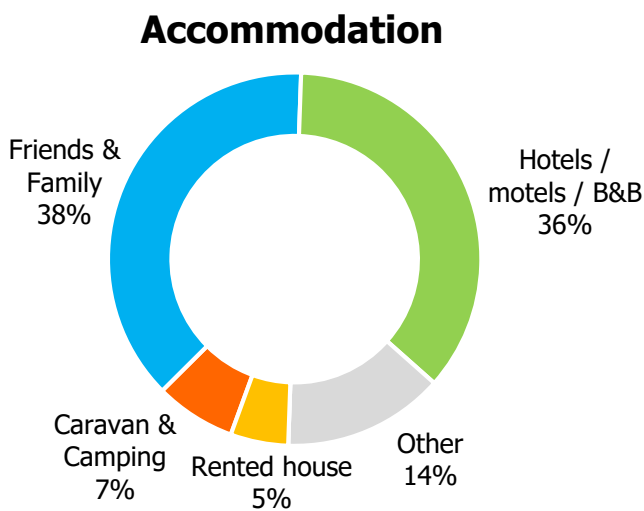




# South Australians visiting Victoria

South Australian visitors to Victoria tend to **stay with friends and family** [38%] or at a hotel, motel, serviced apartment, bed and breakfast or resort [36%].

South Australian visitors to Victoria tend to be **aged between 25-64 years old** [NET=71%]. A quarter of **visitors travel alone** [26%] and a quarter **travel as an adult couple** [26%].

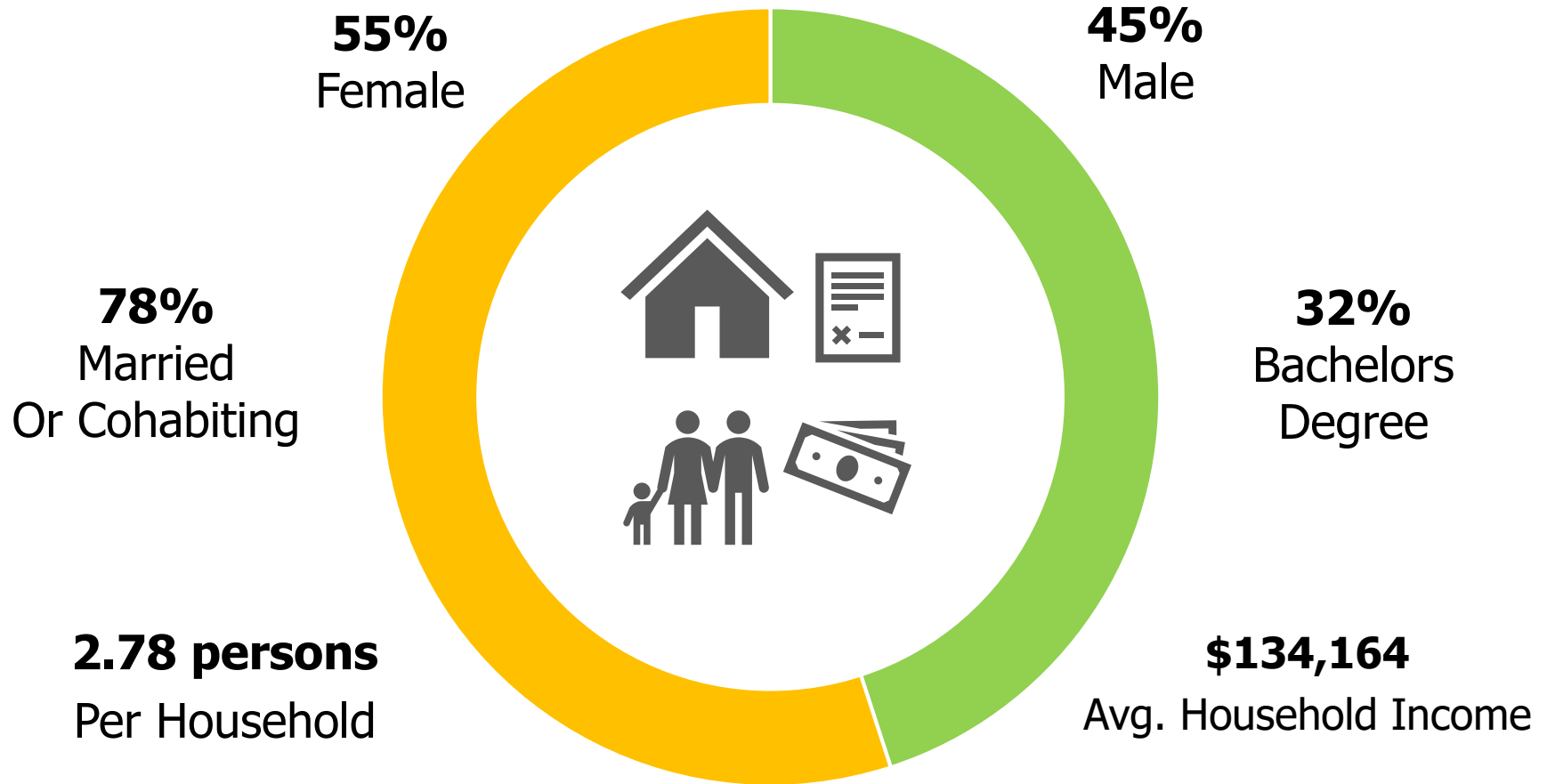


Age Group	
15 – 24 years	14%
25 – 44 years	37%
45 – 64 years	34%
65 years or older	15%

Travel Party	
Travelling alone	26%
Adult couple	26%
Family group	17%
Friends or relatives	21%
Business associates	8%
Other	2%



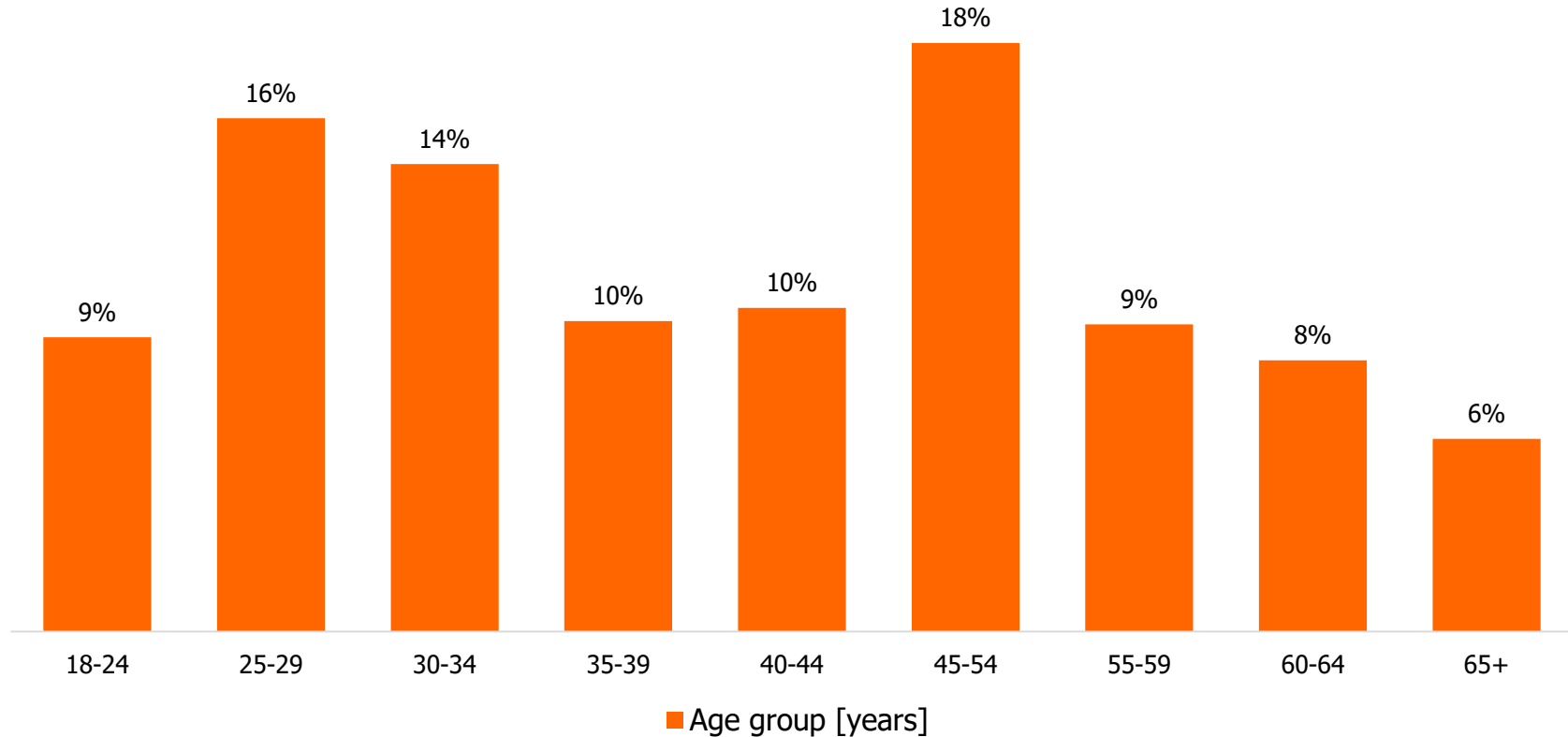
# Who is visiting the Cellar Doors?



# Who is visiting the Cellar Doors?

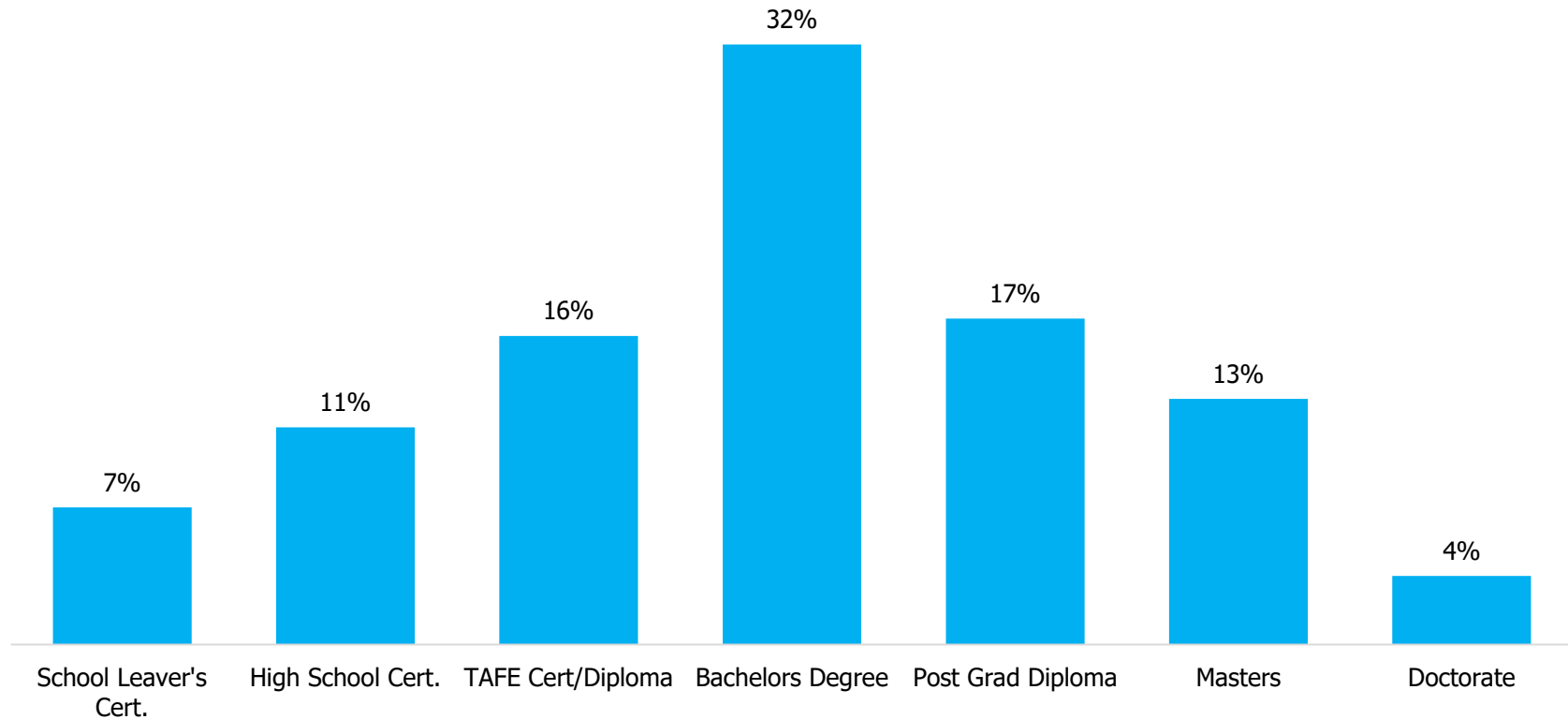
## Age of Cellar Door Visitors

[n=3368]



# Who is visiting the Cellar Doors?

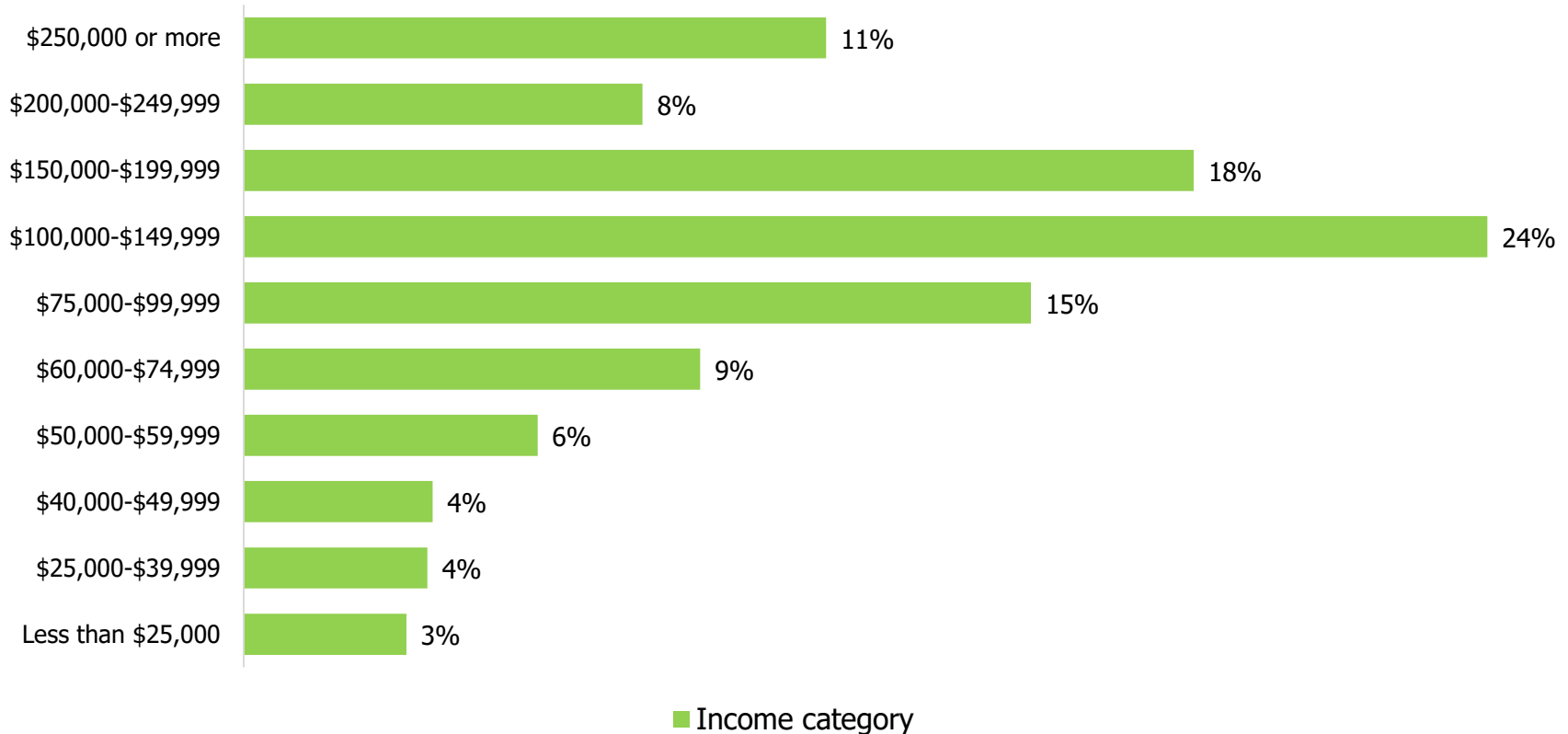
**Education Status of Cellar Door Visitors**  
[n=3368]



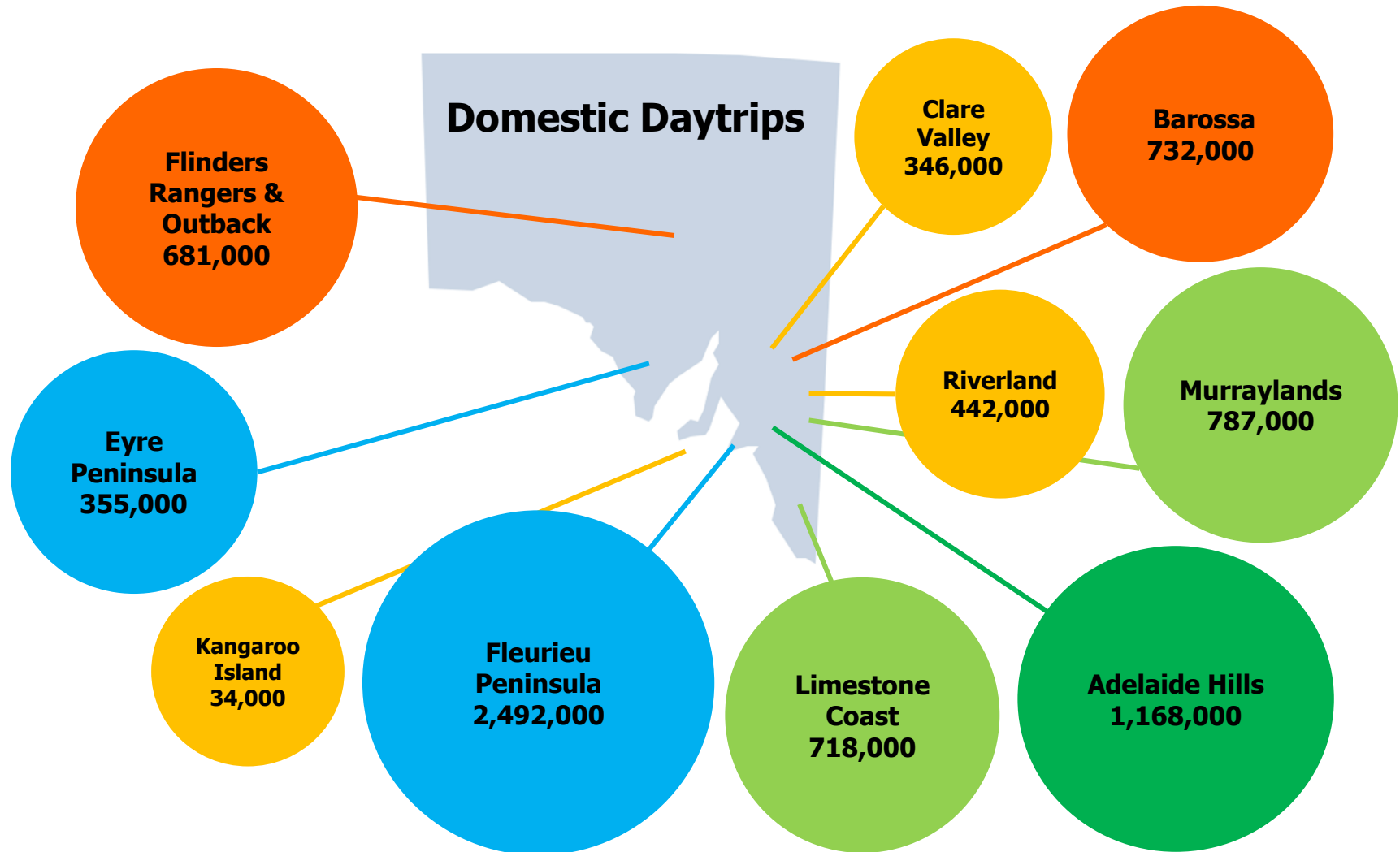
# Who is visiting the Cellar Doors?

## Annual Household Income (Before Taxes) of Cellar Door Visitors

[n=3368]



# Which regions are being visited and when?



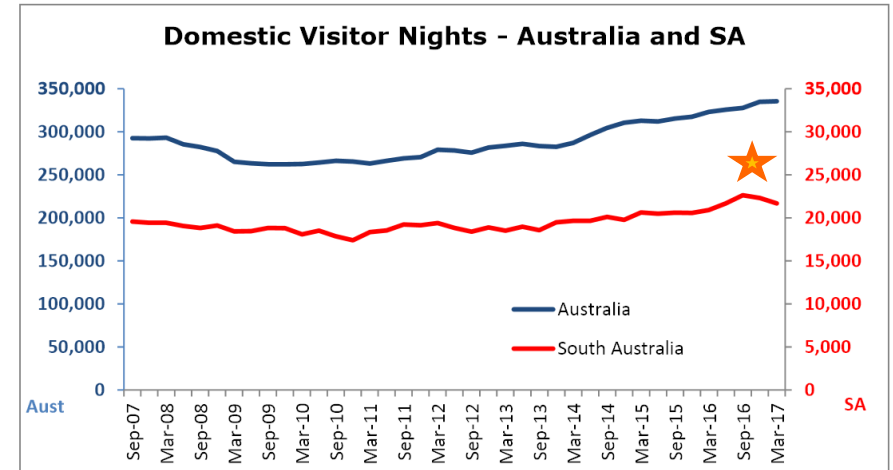
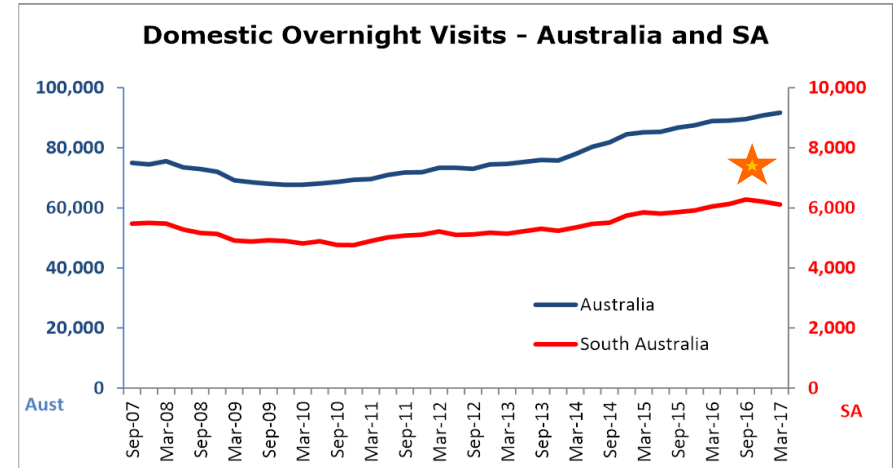
# Which regions are being visited and when?

Overnight stays					
Column %	NET	International	Domestic	Intrastate	Interstate
Adelaide Hills	170,000	4%	96%	53%	47%
Barossa	203,000	6%	94%	65%	35%
Clare Valley	169,000	2%	98%	60%	40%
Eyre Peninsula	427,000	4%	96%	71%	29%
Fleurieu Peninsula	721,000	3%	97%	82%	18%
Yorke Peninsula	487,000	1%	99%	90%	10%
Riverland	350,000	2%	98%	75%	25%
Murraylands	309,000	3%	97%	75%	25%
Limestone Coast	566,000	8%	92%	61%	39%
Kangaroo Island	142,000	29%	71%	71%	29%
Flinders Ranges & Outback	674,000	6%	94%	65%	35%

# Which regions are being visited and when?

Domestic visitors more frequently visit the Fleurieu Peninsula [721,00], Flinders Ranges & Outback [674,00] and the Murraylands/Riverlands [659,00] compared with other regions.

December 2010 was the lowest point of domestic visitation for South Australia. Since then consistent rises in visitation has occurred with no evidence to suggest one season is more frequent or popular than another. September 2016 was South Australia's highest point for domestic visitation.

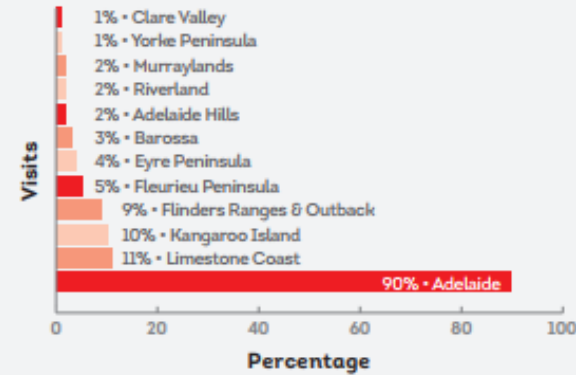


# Which regions are being visited and when?

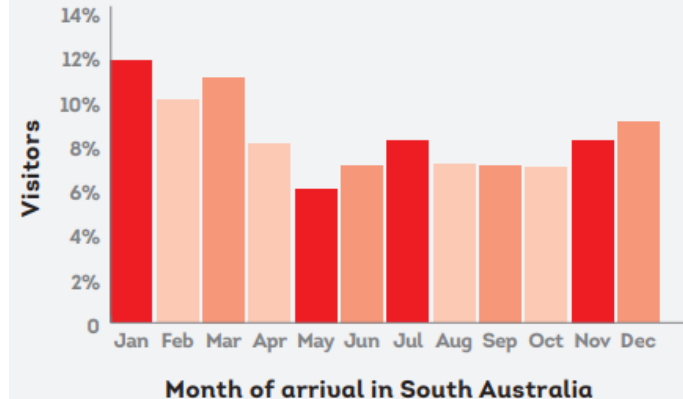
International visitors more frequently visit the Limestone Coast [11%], Kangaroo Island [10%] and Flinders Ranges & Outback [9%] compared with other regions.

The summer months of January, February and March are more popular than other months for international visitation.

## KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

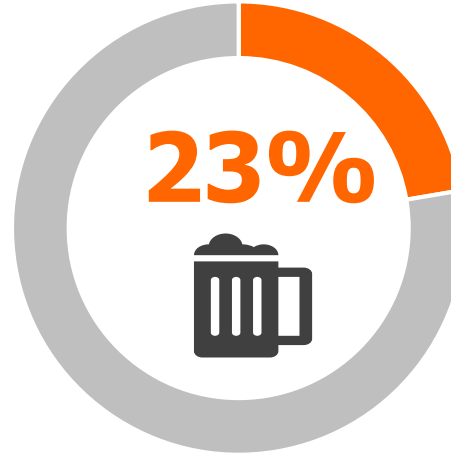
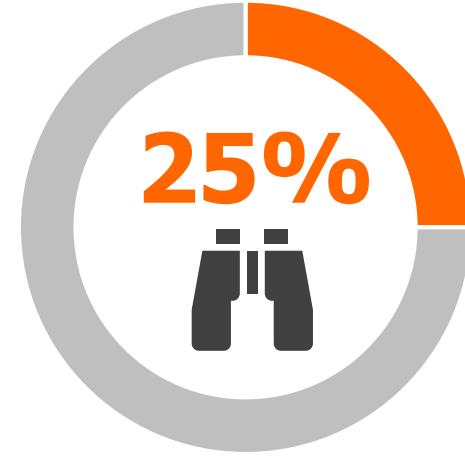
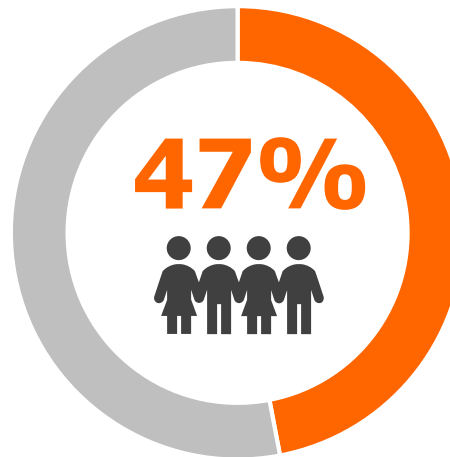
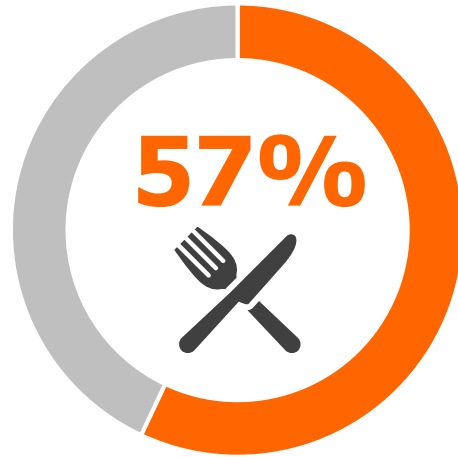







## SEASONALITY



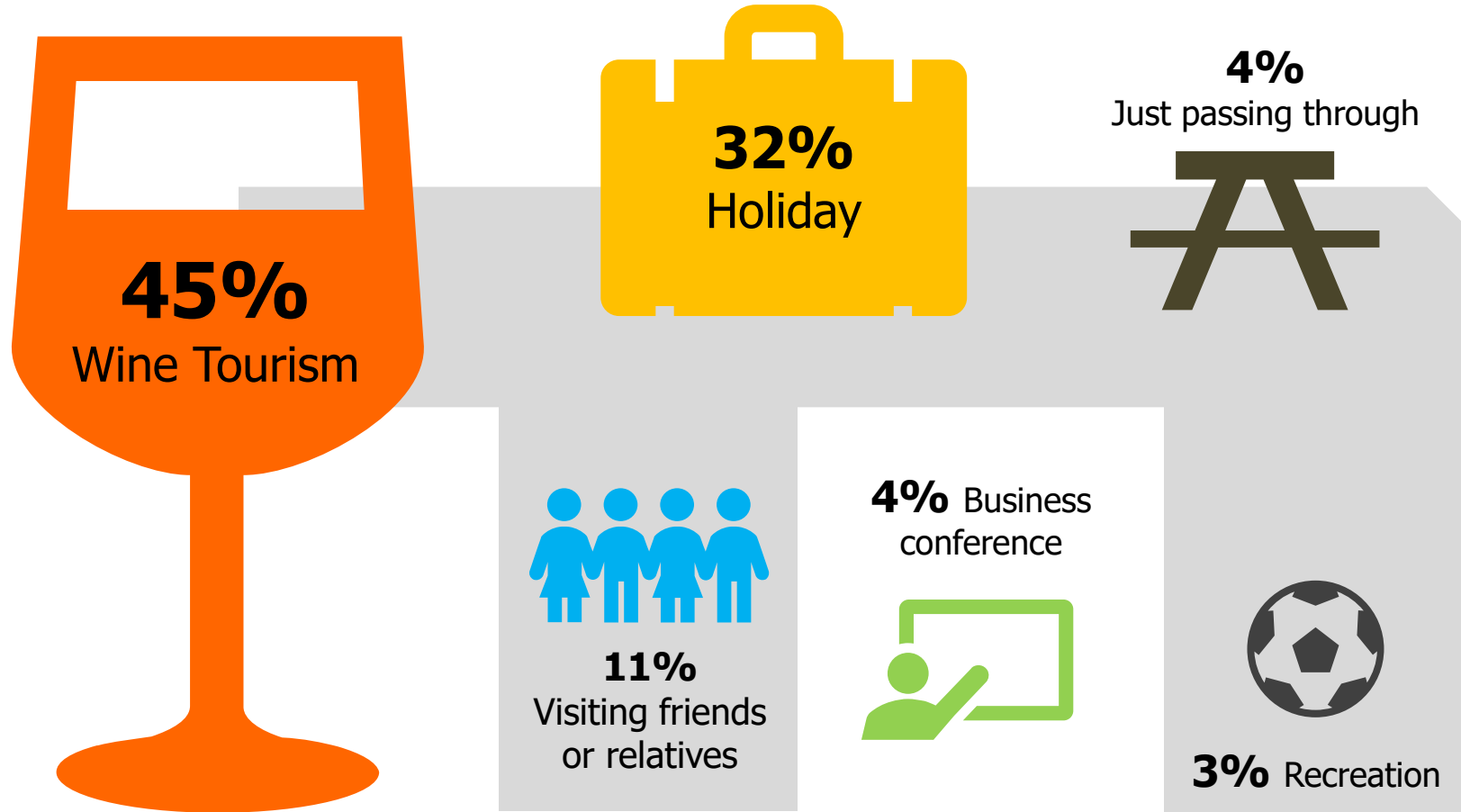


# What are they doing in SA?



-  Dine/Eat out at Restaurant/Café
-  Visiting family/friends
-  Sight seeing/look around
-  Shopping for pleasure
-  Pubs/club

# Why are people visiting the regions?



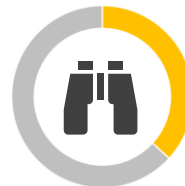
\*Survey conducted at cellar doors

# Regions - Clare Valley

SATC reported that across the regions the three main reasons people visit are to dine/eat out, visit friends/family and sight seeing looking around. The top five activities are reported for each region in the following pages. Visiting wineries was in the top five activities for the regions Clare Valley and the Barossa.



**53%** dining out



**35%** looking around



**35%** visiting family/friends



**33%** visiting wineries



**23%** visiting pubs & clubs

# Regions - Adelaide Hills & Barossa



**64%** visiting family/friends



**63%** dining out



**48%** dining out



**47%** visiting family/friends



**27%** shopping for pleasure



**46%** visiting wineries



**23%** looking around



**33%** looking around



**22%** visiting pubs & clubs



**23%** shopping for pleasure

# Regions - Limestone Coast & Fleurieu Peninsula



**53%** dining out



**41%** visiting family/friends



**31%** looking around



**22%** visiting pubs & clubs



**20%** go to the beach



**56%** dining out



**54%** go to the beach



**41%** visiting family/friends



**34%** looking around



**23%** visiting pubs & clubs

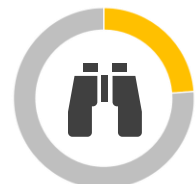
# Regions - Murraylands & Riverlands



**40%** visiting family/friends



**30%** dining out



**21%** looking around



**20%** visiting pubs & clubs



**19%** water activities



**43%** dining out



**39%** visiting friends/family



**29%** looking around



**21%** visiting pubs & clubs



**18%** water activities

# Why do people visit the Cellar Door?

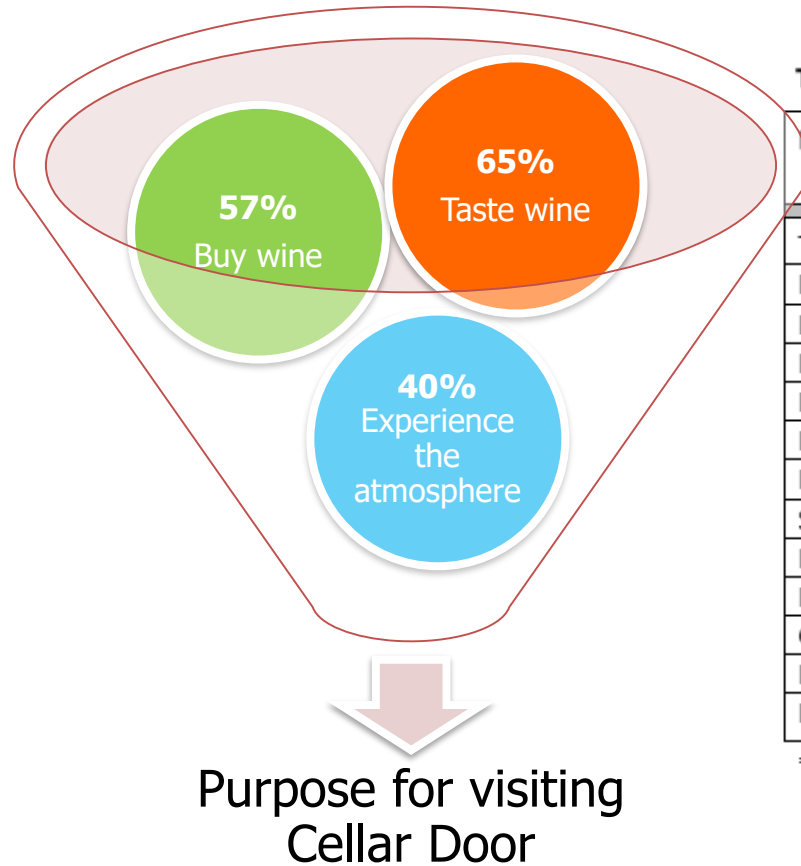


Table 8: Motivations for Visiting the Winery's Cellar Door

Motivation Factor	% Incidence	Ranking Mean*	Ranking Position
Taste wine	65.4	2.25	<b>1</b>
Buy wine or other merchandise	56.6	2.77	<b>3</b>
Experience the atmosphere	39.9	3.07	<b>8</b>
Have a day out	38.9	2.97	<b>6</b>
Learn more about wine	29.9	3.03	<b>7</b>
Entertain myself and/or others	29.7	2.87	<b>5</b>
Find a unique wine	25.4	3.23	<b>10</b>
Socialize with others	21.4	3.19	<b>9</b>
Rural setting	21.2	3.51	<b>13</b>
Have lunch or dinner	18.4	2.72	<b>2</b>
Go on a winery tour	12.2	2.84	<b>4</b>
Find information	9.9	3.46	<b>12</b>
Meet the winemaker	7.1	3.32	<b>11</b>

\* Visitors requested to rank their top 5 motivations (from 1 to 5) for visiting

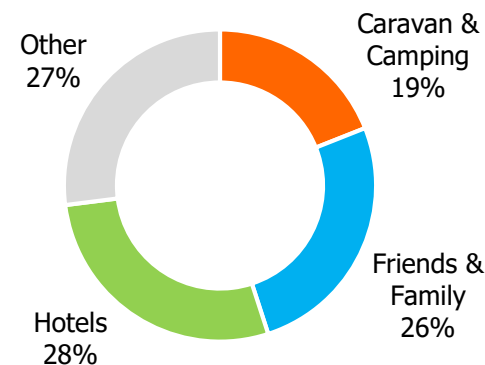
# Where do visitors stay?

SATC reported most visitors to the regions stay with friends and family or in a hotel. SATC reported a large amount of "Other" responses were Bed and Breakfast.

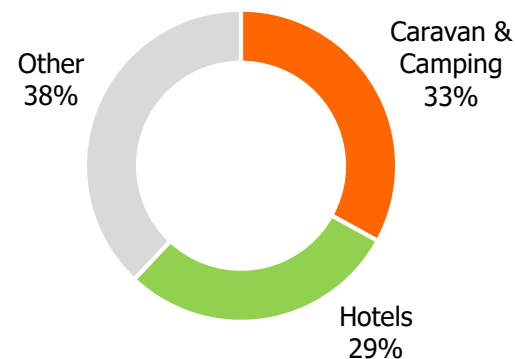
Deloitte reported AirBnB bookings for the year 2016 were 805,500 in Australia for 3,733,300 nights. In South Australia there were 24,400 bookings for 64,100 guests over 109,000 nights.



## Clare Valley Domestic Visitors



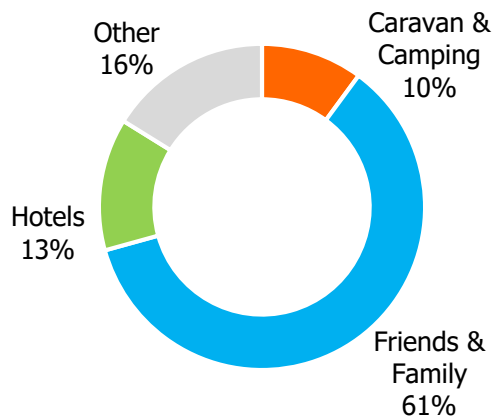
## Clare Valley International Visitors



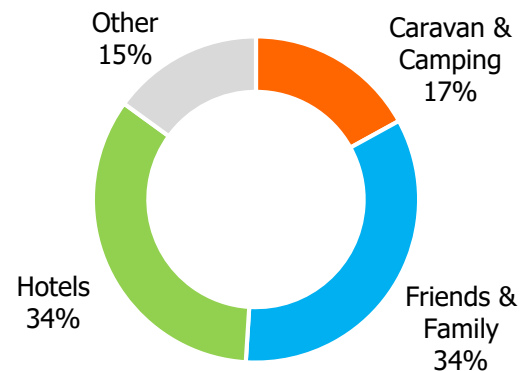


# Where do visitors stay?

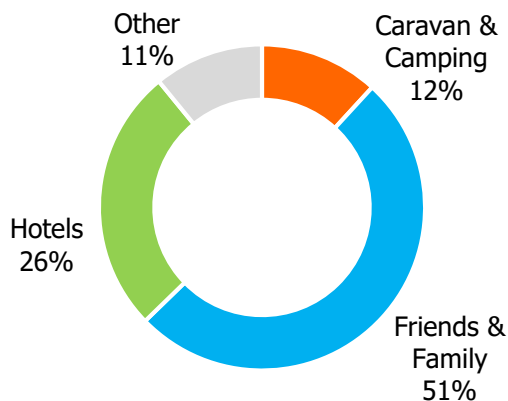
**Adelaide Hills Domestic Visitors**



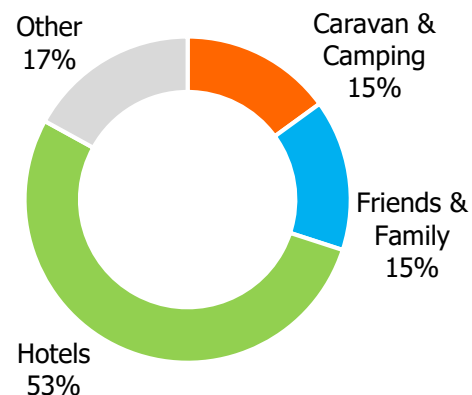
**Barossa Domestic Visitors**



**Adelaide Hills International Visitors**

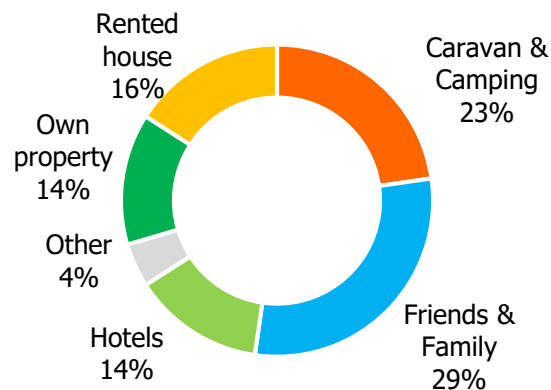


**Barossa International Visitors**

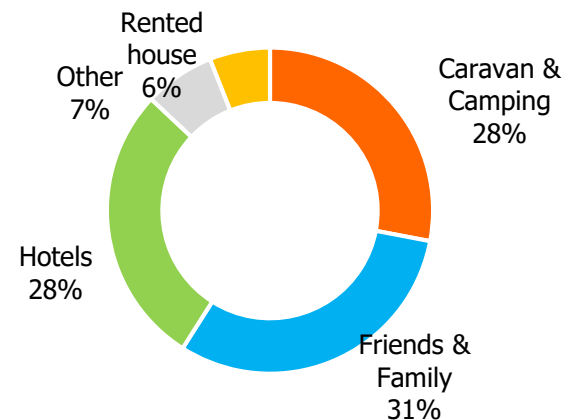


# Where do visitors stay?

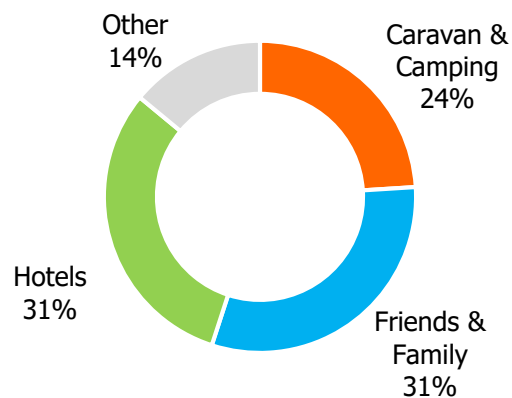
**Fleurieu Peninsula Domestic Visitors**



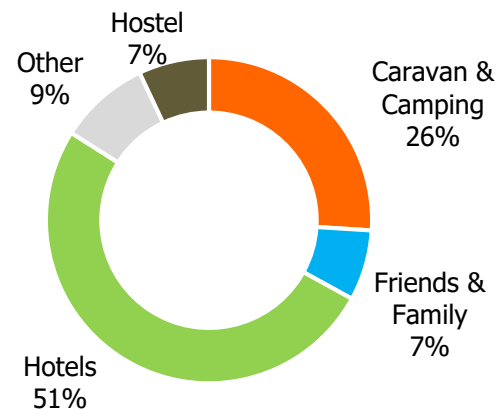
**Limestone Coast Domestic Visitors**



**Fleurieu Peninsula International Visitors**

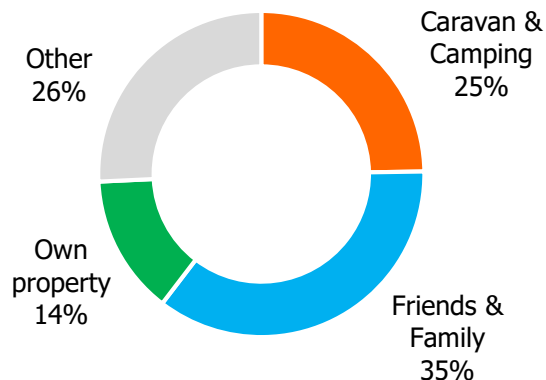


**Limestone Coast International Visitors**

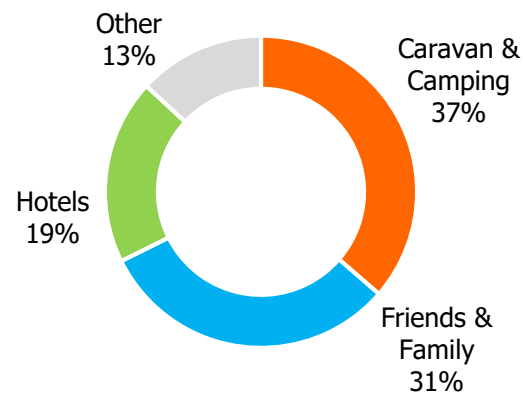


# Where do visitors stay?

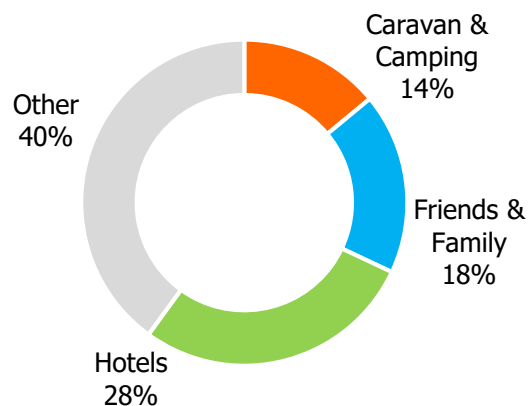
**Murraylands Domestic Visitors**



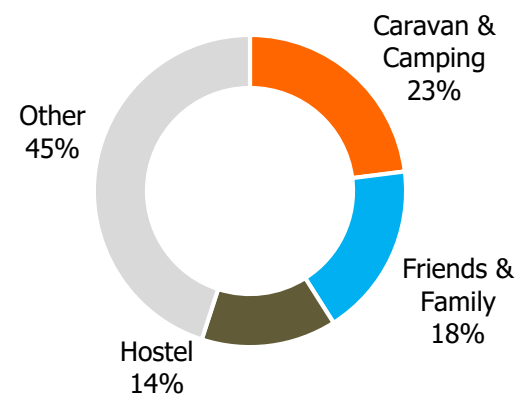
**Riverlands Domestic Visitors**



**Murraylands International Visitors**



**Riverlands International Visitors**





When travelling intra and interstate...

**28%** are likely to **take their own home grown produce**

**37%** are likely to **take store bought produce**

Similar biosecurity issue...

**94%** have **heard of fruit fly**

**72%** state that **prevention of fruit fly is relevant** to them

**80%** state that **fruit fly awareness and prevention is important** to them

**60% of the population** have found themselves in a situation where they've had to **minimise the risk of fruit fly by using inspection points or bins at some stage.**



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”

**In-depth interviews**

# Visitor Behaviour

The regions had a variety of visitors from intrastate, interstate and overseas. The wineries and visitor centres highlighted the following visitor behaviour:

- People visit the regions for a number of different reasons, not purely to visit wineries
- Weekdays are more intrastate visitors compared with interstate or overseas visitors
- A growing number of visitors from Australian Eastern states
- A growing number of visitors from South East Asia
- Asian visitors are more likely to venture into the vineyards compared to other visitors
- Most domestic visitors understand you should not venture into the vineyards
- The main reason people venture into the vineyards is for a photo opportunity
- Generally visitor behaviour is well policed except for large groups, weddings and areas away from the cellar door



**“People want a different experience as well now, not just the wineries, they want to do those walks and take in the country side.”**

**“They really like to take photos in every location.”**

**“South East Asian guests do tend to explore more than others.”**

**“We are trying to create experiences.”**

# Understanding of Biosecurity

The staff at the wineries and visitors centres had a high understanding of biosecurity and phylloxera. They expressed the general public [besides wine connoisseurs] would have very little knowledge about the diseases that impact the vines.

Each region is busy focusing on themselves and therefore has little to no knowledge of what is happening in other regions.

**“Not a lot of people would know about biosecurity.”**

**“I’m not saying it’s impossible but the likelihood is seriously low.”**

**“If you’re not into wine you wouldn’t even know about phylloxera.”**

**“I’m not sure about other regions.”**



# Communication

The wineries and visitor centres were accepting of the importance of biosecurity and the need to better educate visitors about protection methods.

Visitor centres and wineries were welcoming of the idea that Vinehealth Australia could provide a consistent level of education, materials and expectations to all wineries and visitor centres [across all regions].

The main messages from the regions are:

- The signage needs to be in different languages
- Educating the tour bus drivers
- New brochures would be used



**“As an industry, if we came up with one standard sign we would probably use it.”**

**“It needs to be in Mandarin.”**

**“There used to be a brochure about, I haven’t seen it for a long time.”**

**"I have seen signage around, so I know lots of them do it."**

**"They talk about the Phylloxera on there."**

**"We don't tend to encourage that  
obviously because of the bio hazard ."**

**"Policed with the person you  
are walking around with."**

**"We do tell them not to go through the vines."**

**"A very serious message."**

**"I'd be quite open to have someone come speak to us and tell us it is a really important issue and we need to educate visitors more."**

**"Consistency of the message and perhaps some other languages as well."**

**"Lavender hedge around the edge as a buffer."**



## Vinehealth Australia – In-depth interview Discussion Guide [P/N 170802]

### Introduction

- ☐ Purpose of research -
- ☐ A series of in-depth interviews with relevant wine/ tourism industry representatives
- ☐ Open and honest opinions are essential
- ☐ Confidentiality is assured, recordings only used for preparing the report

### Who are they?

- ☐ Brief description of your role/ organisation

### General discussion of visitor behaviour?

- ☐ How does wine tourism fit with your organisation?
  - Where are the majority of visitors to your region from? Any emerging trends/ differences? Over the last few years/ different times of year?
  - Understanding of visitor behaviour
    - Who is visiting?
    - Why are they visiting?
    - Seasonal changes in visitor demographics?
    - Do they also visit other wine regions/ plan to visit other areas?
    - Information sources/ how tech savvy are most visitors?
    - How are they moving around? Both to get to the area and once in the area
    - Visitor expectations, what do they expect to do when in the region
    - Accommodation and dining
    - Visitor expectations when visiting cellar doors? Cellar door only, wander through the vines etc

### Understanding of biosecurity

- ☐ Understanding of biosecurity

Description read out if necessary: Biosecurity is about reducing the risk of entry, establishment and spread of pests, diseases and weeds. Biosecurity for the wine industry is a shared responsibility between government, industry bodies, wineries, grape growers, contractors, nurseries and the broader community including visitors, something we all need to work collaboratively to achieve.

- Do visitors to the region understand the importance of biosecurity? What it is? And what it means to the wine industry? Have visitors commented that they have seen advertising regarding biosecurity in any other regions/ cellar doors etc?
- Do you know the most likely ways in which pest and diseases could be spread by visitors?



- Can you think of any businesses or sites where there is a focus on biosecurity? How was this achieved?
  - Signs
  - Well informed cellar door staff
  - Vineyards off limits to casual visitors
- What is your feeling on the proportion of visitors who actually walk down vine rows [either encouraged by the cellar door they visit or they do it on their own accord]?
  - Are there other solutions such as:
    - ◆ Shoe washes
    - ◆ Provided rubber boots
    - ◆ Other ideas
- What activities do you think cellar doors [or visitor centres] could do to bring the outside in as a replacement for visitors walking amongst the vine rows?

### Communications

- ☐ How can the importance of biosecurity best be communicated to visitors to wine regions?
  - Signage [throughout region/ winery based]
  - Brochures [visitor centres/ wineries/ restaurants/ accommodation]
  - Social media/ online
- ☐ What needs to be communicated?
  - That South Australia has the oldest grapevines in the world and why this matters
  - That visitors can play a role in helping to protect our grapevines to ensure they are there next time they visit and for others to enjoy
  - That South Australia is phylloxera free, fruit fly free and GM free and the importance of maintaining this
  - The economic importance to the wine, tourism and food industry of remaining phylloxera free
  - The importance of not spreading the phylloxera virus/ farm gate hygiene
- ☐ Ensuring farm gate hygiene
  - Suggestions to encourage cellar doors/ other tourist operators to comply with good practices
  - How best to communicate the message to wineries/ cellar doors etc?
  - How can they communicate the message to their visitors without impact on their business?

### Closing priorities

- ☐ What are the strategic priorities for Vinehealth Australia in terms of raising awareness of biosecurity for:
  - Cellar door
  - Visitors
  - General tourism
- ☐ Are there any other comments you would like to add regarding winery visitors or biosecurity?

Thank for their time and help



