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Vineyard Visitors Survey

Many wine producing regions around the world have, over the last twenty years, sought to actively encourage the public into their vineyards and wineries. A similar trend can be observed in the UK where the increasing number of producers in England and Wales has led VisitBritain to suggest that English and Welsh vineyards offer the visitor 'the opportunity of a most enjoyable day out'. But what of the owners – why do they open to the public – is it simply for profit or are there other reasons? It was in order to answer this and other questions that I visited about 30 vineyards in 2007 as part of a study carried out by Bournemouth University and led by Professor Roger Vaughan and Doctor Jonathan Edwards.

The overarching aim of the research was to create a 'snapshot' of the wine tourism sector in 2007 and the potential for wine tourism, in England and Wales. We used web-based sources to identify vineyards that might potentially receive visitors and following letters, emails and telephone calls we found 113 that do so. Interviews were carried out at 34 vineyards; one telephone interview took place and 31 questionnaires were received by post, totalling 66 responses in all. In each case, identical questions were asked. Therefore, 58% of vineyards that receive visitors participated in the survey.

Profit or Passion

A report of some of the initial findings has already been sent to the vineyards that assisted us and so here I would like to give a review of some of the issues facing owners who decide to open to the public. When asked the reasons for planting a vineyard, 9% of respondents stated that this was for profit and 15% for diversification, but 55% referred to personal interest and 24%

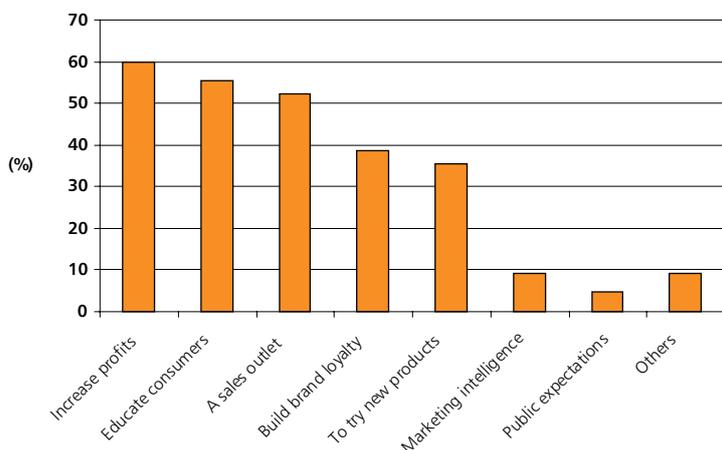


Figure 1 Reasons for opening the vineyard to the public

for a change of lifestyle. However, an increased profit was the most cited reason for opening the vineyard to the public (Figure 1).

Tour Elements	Minimum price (£)	Maximum price (£)	Average price (£)
Guided tour of vineyard and tasting	0.00	8.00	3.66
Guided tour of vineyard, winery and tating	0.00	7.50	3.35
Guided tour of vineyard, winery, storage and tasting	0.00	8.00	3.44
Unguided tour of vineyard and tasting	0.00	3.00	1.67
Trail around vineyard and tasting	0.00	0.00	0.00

Table 1 The most frequently offered tour options

The vineyards that participated in the research are spread across 25 counties in England and 4 in Wales confirming that opening to the public is not restricted to vineyards in tourism destinations. The number of visitors to the vineyards in 2006 varied from a vineyard receiving 6 specialist visitors to one that has about 50,000 visitors. However, the average number was just under 4,000. This suggests that the whole sector is approaching half a million visits each year. Almost two-thirds of individual visitors arrive at their own convenience, but the majority of vineyards require all tour groups and coach parties to arrange a prior appointment before visiting; only 4 respondents were willing to accept groups without arrangement.

Respondents were asked about the composition and nature of any tours they provided and the options identified most often are shown in Table 1. The right-hand columns of the table give the minimum and maximum prices vineyards charge, together with the average amount. That some vineyards are making no charge for a tour or tasting whilst others do have a fee may reflect the disparity in the motivations of owners in opening to the public. Equally it is clear that in comparison to many other visitor attractions (for example, the average cost of entrance to a garden in 2005 was £4.51) a visit to a vineyard is in general very competitively priced.

We asked about the facilities the vineyards make available to the public and hence the type of experiences they can offer visitors. The most prevalent are access to the vineyard (95% of establishments) and opportunities to taste wine (82%). A visit to the winery and retail facilities are also popular. About a third of establishments allow visitors into their storage area or provide

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Photo 1. Vines under glass at Strawberry Hill Vineyard, Gloucestershire

additional visitor amenities, such as catering, accommodation or education facilities.

Enabling visitors to go into the vineyard is seen by respondents as a means of increasing sales (26%); encouraging visitors' interest (23%); and promoting English or Welsh wines (6%). One stated, 'Simply to demonstrate that England can produce some surprisingly good wine'. Others feel that visitors want to see the vines and are interested in their growth, while some want visitors to recognise what is involved in growing the grapes. A few, however, are more reluctant, one stating that there is a public right of way through the vineyard, so that they cannot restrict access, and another, that they 'can't keep them out!'

Through my visits, I learnt that many owners seek not only to inform their visitors about viticulture, but also want to share their own experiences of operating the vineyard – some stressing the difficulties and problems faced, whilst others the successes and pleasure it gives. Often during these conversations, many of which took place between the vines, I noticed that the owner would be absent-mindedly tucking in or nipping out the ends of shoots, in the same way that a gardener deadheads flowers. I assume that like other visitors I was also struck by the variations between vineyards, some such as Strawberry Hill Vineyard, in Gloucestershire being memorable for the vines growing under glass (Photograph 1).

Of all the vineyards responding to the survey, 50% have their own winery and only one does not allow access to visitors due to fears that they could interfere with the equipment. The other owners believe that the winery is an essential part of any tour and again that visitors are interested in all aspects of wine production, including the corks, laboratories and testing, for example. Whilst some of the wineries promote a sentiment of 'hand-made' wine, others such as Wickham Vineyard impress

with stainless steel from floor to ceiling (Photograph 2). Given that the principal stated objective of opening to the public is as a means of increasing sales, it is not surprising that 82% of vineyards have a tasting area with a third of those stating that this is specifically there to encourage sales. The type of tasting areas varies from purpose built facilities, for example, at Highdown Vineyard in West Sussex (Photograph 3) to the common arrangement of two oak barrels with a sheet of glass resting on top. Many owners feel that a tasting area creates a focal point during the tour and the right ambience for tasting. Tasting allows visitors not only to try new wines, but also ensures that they buy wines they like.



Photo 2. The winery at Wickham Vineyard, Hampshire

Two-thirds of the vineyards have a sales or retail area of some form and as would be expected this is primarily in order to sell their wine. The average floor space of the retail area is 69 m²,

VINEYARD VISITORS SURVEY



% of retail areas

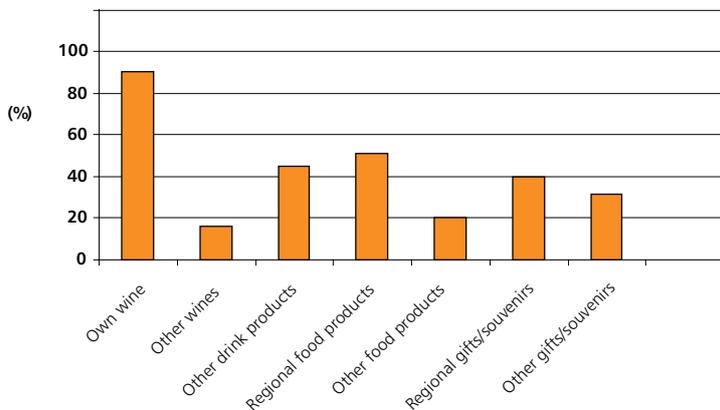


Figure 2 Products stocked in retail areas

with the smallest being 3m² and the largest, 300m². On average about two-thirds of visitors buy wine during a visit, but this varies widely across the sector. Many vineyards sell other drink products and/or regional food products, but only 14% sell wines from other vineyards or wineries (Figure 2). Most vineyards without a retail area felt that they were constrained from doing so, whether by the unsuitability of their location, their lack of retail expertise, planning, licensing or staffing issues.

Similar constraints were suggested by respondents as reasons for not providing catering facilities. Thirty-two per cent of vineyards have catering facilities, the majority a restaurant, but others offering a café, tearoom or picnic area. The size varies considerably, from 10 to 200 covers indoors and from 13 to 300 covers outdoors. Unlike the retail areas, which are perceived as direct sources of income, catering facilities are mainly provided as an adjunct to the core business with 11% of respondents stating that they encourage people in and only 5% referring to increased turnover.

Other non-core amenities offered by vineyards are accommodation and visitor education facilities. Twenty vineyards offer accommodation to visitors: 9 having self-catering and 7, bed and breakfast facilities but only 4 vineyards specifically cited additional income as a reason for providing accommodation.

About a quarter of vineyards (17) offer some form of education/information facilities. In 6 vineyards, this was provided in a separate room, with video presentations and exhibitions. An excellent example of interpretation is the demonstration vineyard at Frome Valley Vineyard, Worcestershire, where diverse vine training methods are adopted next to each other, allowing the visitor an unparalleled opportunity to make comparisons between them.

When we asked respondents about the difficulties of opening, 17% replied that there are not any. For the remainder of respondents the main issues cited were first, problems of bureaucracy, planning permission, licenses etc.; secondly, the difficulties of staffing and being tied themselves and thirdly, issues relating to their location. For example, one respondent expressed his view of bureaucracy by describing the major benefit he has encountered in opening to the public as 'Beating

the Council!'

Several owners spoke to me of the frustration of not knowing when visitors may arrive – usually, some said, they appear just when the weather has turned for the better or as one told me – I know that as soon as I put on all the protective clothing to start spraying, a group are bound to turn up! This perhaps explains why only about half of the vineyards open every day of the week, with a fifth open for less than 3 days a week. Two-thirds open for 12 months a year with just a few opening for less than 6 months.

Turning then to the benefits of having visitors, the survey shows that all the respondents believe that there are advantages from opening to the public, 44% citing the increased sales or profits and 15% referring to the pleasure they receive from meeting interesting or informed visitors. When asked how selling wine to visitors contributes to their enterprise, 43% stated that it is their principal source of income with a further 13% acknowledging that it is a useful addition. Only 11% feel that sales do not contribute a lot.

In setting out some of the findings of our research I have tried to identify many of the issues owners face in opening to the public. For those, who have already taken this step, there may



Purpose-built visitor facilities at Highdown Vineyard, West Sussex

be interest in comparing your vineyard to that of your colleagues, for the few who have chosen to close to visitors, it may confirm your decision and finally for the majority of vineyard owners who have not yet taken this approach, I hope it will help you decide whether to proceed or not. To sum up my own memories of visiting last summer, I'll use the words of one respondent who when asked to describe the type of experience they seek to provide for visitors, simply stated 'Our passion rubs off'.

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