


LESSONS FROM THE TASTING ROOM
2016 VISITOR RESEARCH
PHILIP COPPARD

STORMY
LAKE
CONSULTING



4 research questions


A woman with long brown hair, wearing a grey turtleneck sweater, is smiling and holding a glass of red wine. The background is a blurred restaurant interior with warm lighting. A semi-transparent dark banner is overlaid across the middle of the image, containing white text. On the right side of the image, there is a vertical bar with colored segments: blue, purple, orange, and yellow.

I. What influences the
wine tourism experience?




2. What influences the culinary tourism experience?



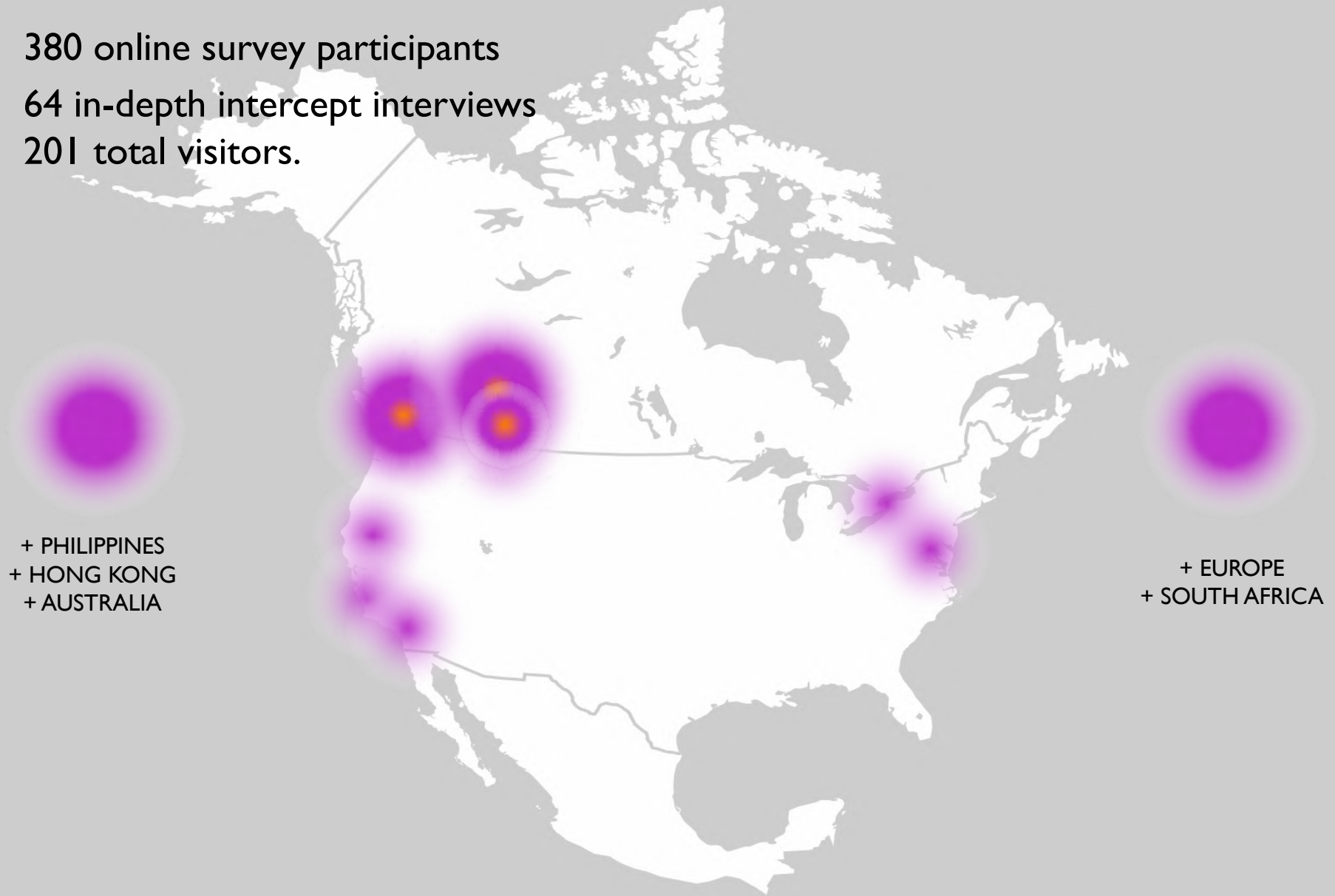
A wooden sign for Orofino Winery is hanging from a post. The sign is made of horizontal wooden planks and features a small illustration of a vine and leaves at the top. Below the illustration, the word "OROFINO" is written in large, serif capital letters, and the word "WINERY" is written in smaller, sans-serif capital letters below it. The sign is set against a background of olive trees with green leaves and small olives. A semi-transparent black box with white text is overlaid on the sign.

3. How do visitors choose wine & culinary touring experiences before and during their visit?



4. How do visitors navigate the region while they are in market?

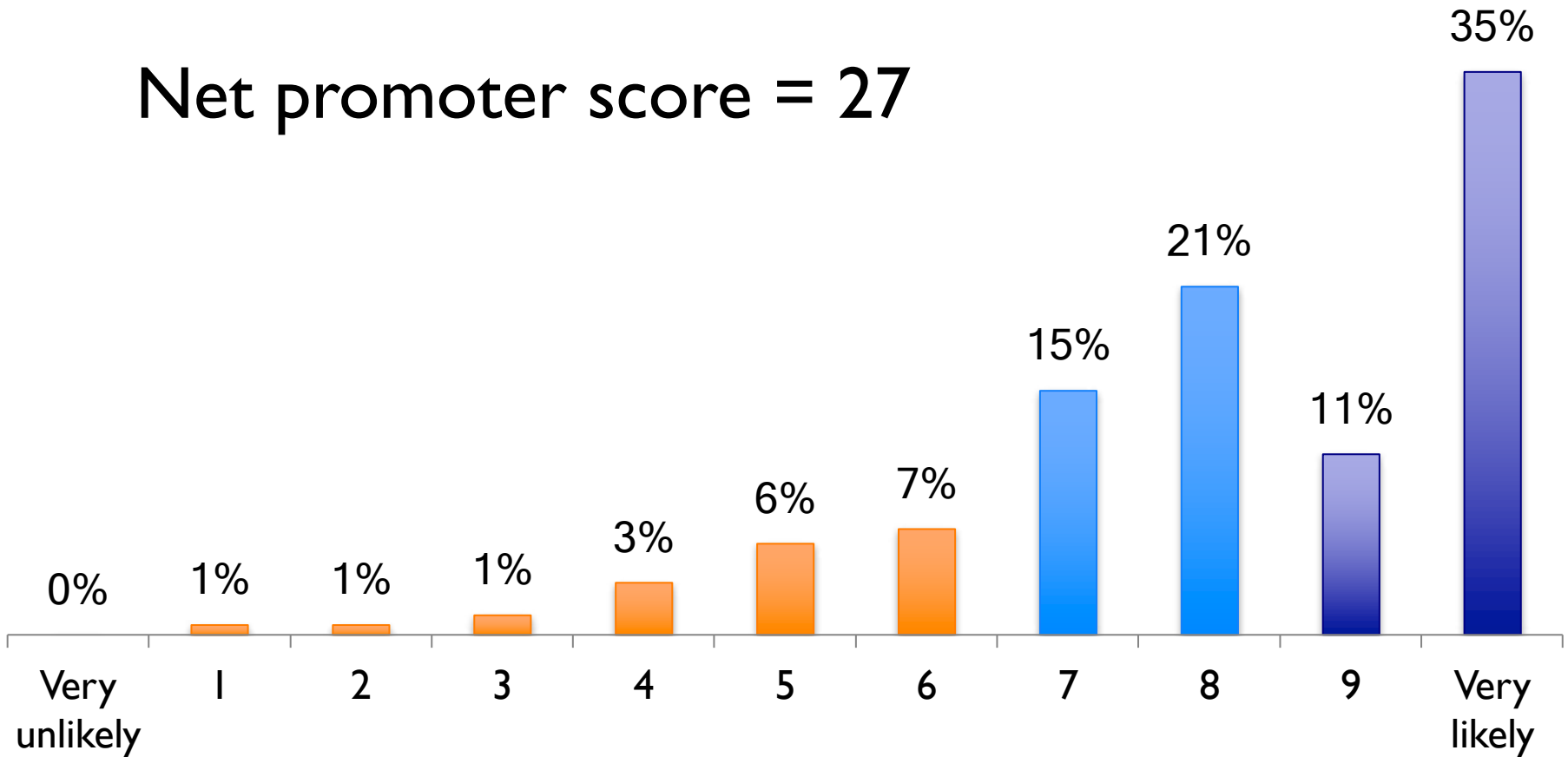
380 online survey participants
64 in-depth intercept interviews
201 total visitors.





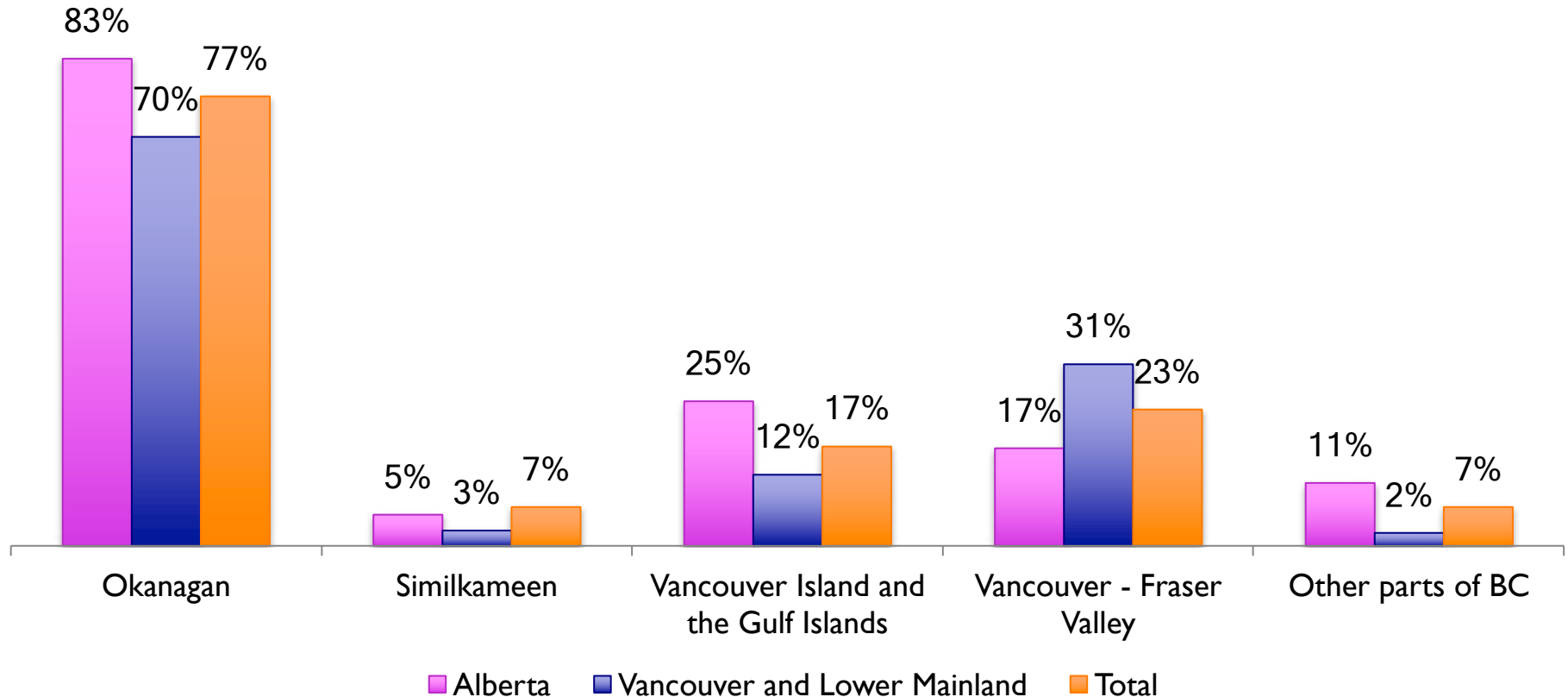
80% of visitors had a good or excellent wine touring experience.

Net promoter score = 27

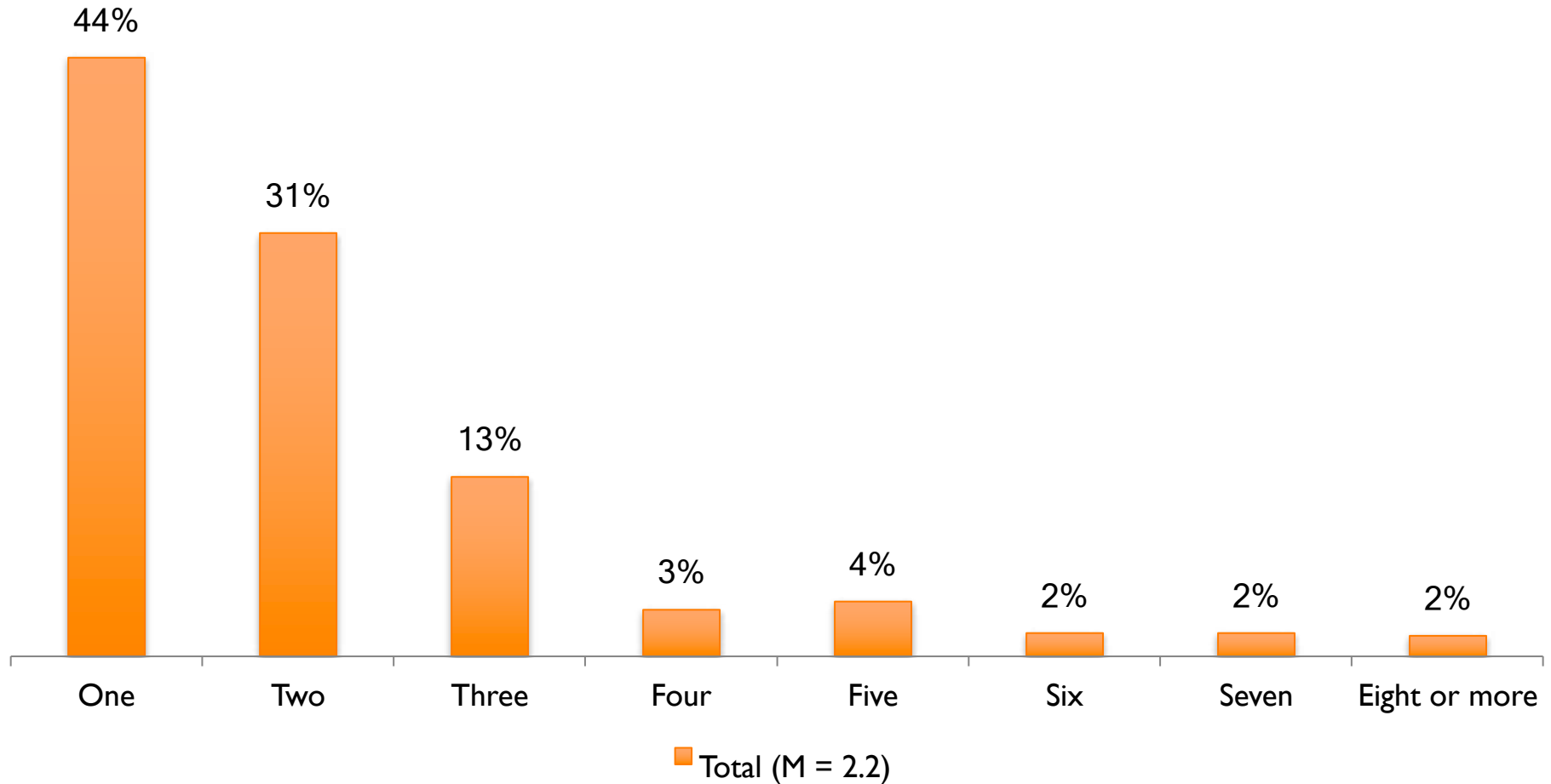


The Okanagan is the most frequently visited wine region in BC.

What regions of BC did you visit during your trip?



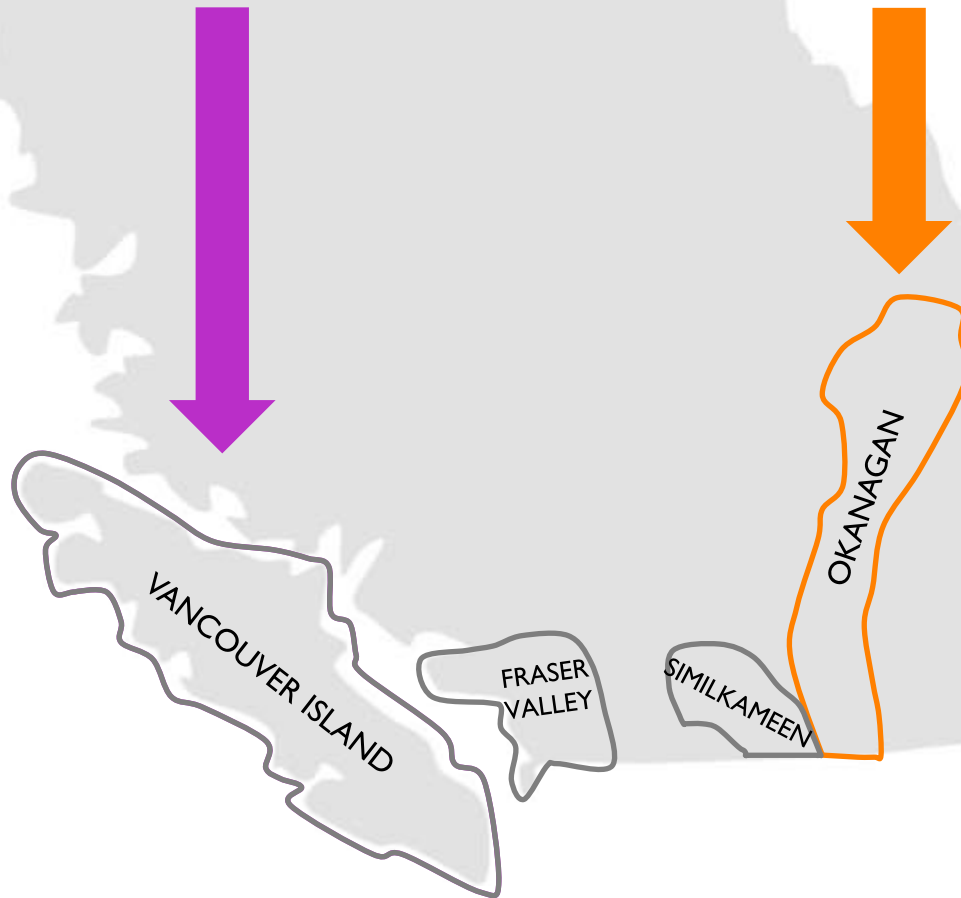
Most wine touring take place over a two day period.



How important is wine touring, out of 7?
“When we’re in this area it’s a 6 or a 7, when
we’re elsewhere it’s not as important.”



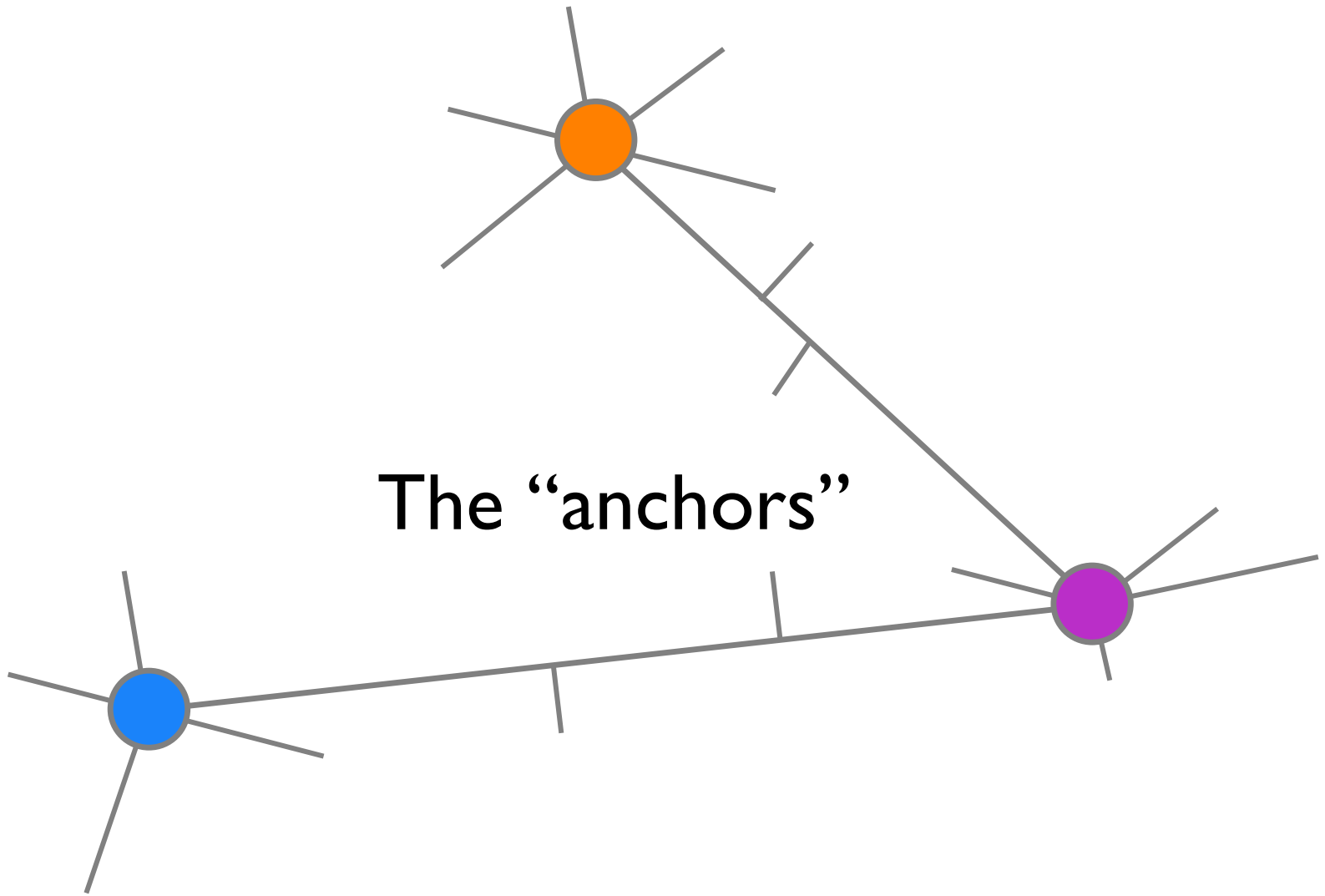
Where's the opportunity?



A top-down view of a brown cardboard wine box. The box is divided into several compartments by vertical and horizontal dividers. Each compartment contains a bottle of wine, with only the cork and a small portion of the neck visible. The corks are various colors: silver, orange, red, lime green, black, purple, dark red, light blue, dark blue, and white with a purple horse logo. The text "Visitors go to more wineries than they planned." is overlaid in the center in a white, sans-serif font.

Visitors go to more wineries than they planned.

The “anchors”





FAMILIAR

+



NEW

+



SPONTANEOUS

“We’re just traveling hit and miss by the signs. We liked the name of the winery, saw the sign, thought it might be good.”

Stoneboat
VINEYARDS




WINE SHOP & TASTINGS

OPEN DAILY 10 - 5:30 pm

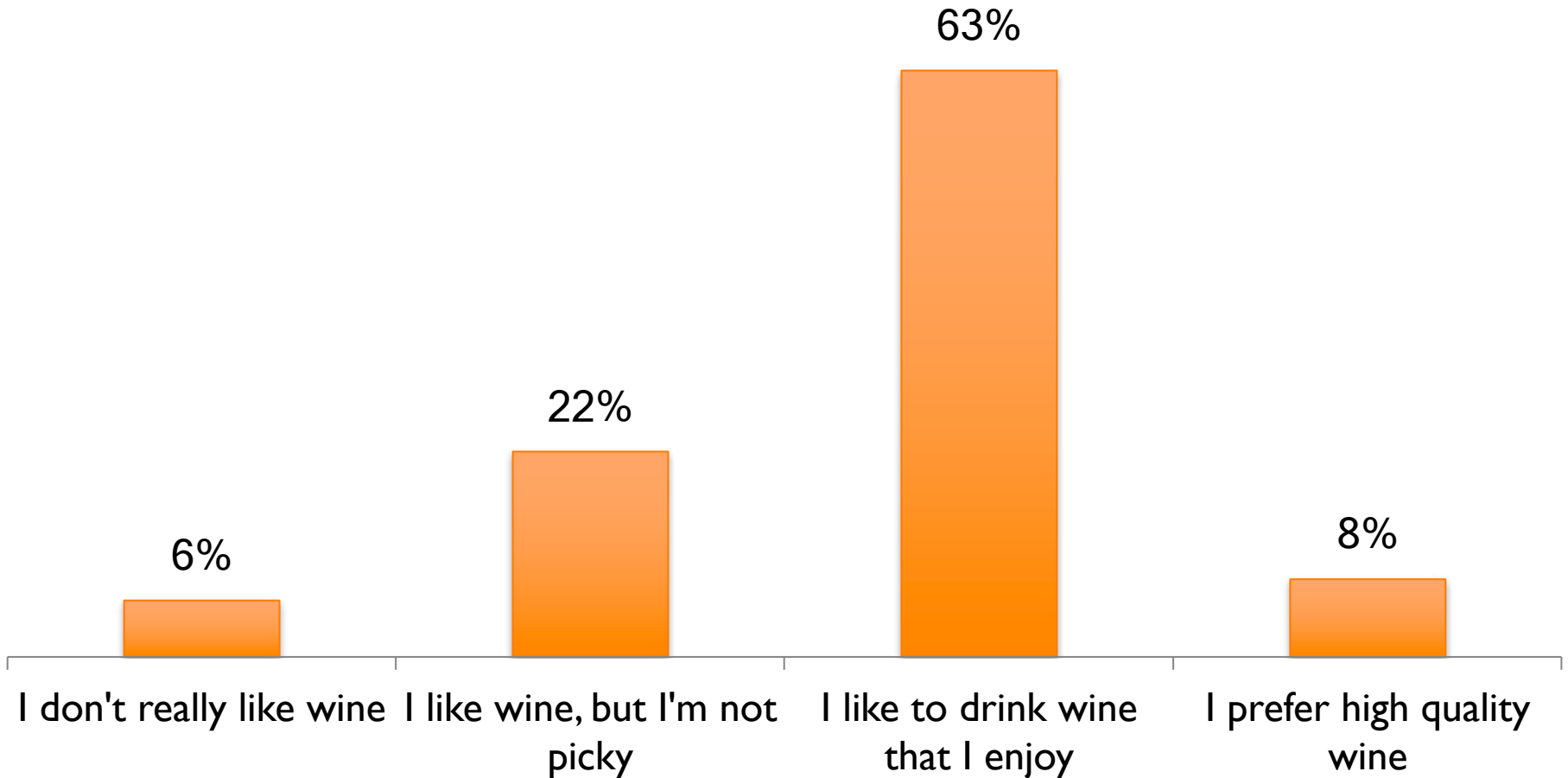
VISITOR SEGMENTATION



A photograph of a man smiling in the background, sitting outdoors. In the foreground, there are three wine glasses filled with red wine and a bottle of Lang Vineyard wine. The text is overlaid on the image.

The majority of travellers like to drink wine that they enjoy as opposed to “high quality” wine.

The majority of travellers like to drink wine that they enjoy.



Five main categories of visitor were observed

Wine Enthusiasts

it's all about the wine

Experiencers

wine in combination with

Culinary

Lodging

Sport

VFR

Exploration

Celebration

Drinkers


Locals

Industry

“Wine is a 10/7 importance. The only other thing we are doing is sleeping.”




Wine enthusiasts

A scenic view of a vineyard with a dirt path leading through rows of grapevines, framed by a large wine glass in the foreground. The glass is partially filled with red wine. The background shows a clear blue sky, green trees, and distant hills.

“Yesterday we visited 3 or 4 wineries around Vernon. I can’t remember their names.”

Wine experiencers

A man and a woman are dancing in a grassy field. The man is wearing a light-colored t-shirt and dark shorts, and the woman is wearing a light blue long-sleeved shirt and jeans. They are both smiling and appear to be enjoying themselves. In the background, there is a large, rusted metal sculpture of a person with long, flowing hair, possibly a Native American figure. The sculpture is situated in a vineyard with rows of grapevines. Beyond the vineyard, there are rolling hills and mountains under a cloudy sky. A black text box is overlaid on the right side of the image.

“We’ve got friends coming in November. We’re building a list of wineries to bring them to. This one will definitely be on the list.”

Local hosts



THE WINERY EXPERIENCE

Wine enthusiasts

For Wine Enthusiasts a great experience is:

- Learning something new and specific
- Developing a personal connection to the vintner/owner
- Creating an appreciation for the wine making process
- Generating a feeling of getting an 'inside track'

The experience enhances the wine, but it means nothing if the wine is bad.



Awesome Red Wine + Okanagan + Affordable = Mission Impossible?

Published on September 16, 2016



Derrick Rozdeba

Vice President Communications | Bayer Canada



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It is true that some south Okanagan winemakers are making some fine red wines but most come with a significant price tag. In most cases these wines can only be consumed on special occasions unless money isn't an issue. If you had twenty dollars in a wine store your first wine choice wouldn't be a Canadian red wine. Am I right?

This year's wine tour was still in search of big reds but with the lens of value or better

Wine experiencers

For Wine experiencers, outside of the quality of wine, a great experience is:

- Navigation without panic
- A personal connection to someone at the winery (not necessarily the vintner)
- Finding somewhere that makes them feel unique in comparison to their regular lives
- Pairing the experience with a culinary experience
- A feeling of relaxation and comfort that juxtaposes with their regular lives.

The experience makes the wine taste good. Wines have to be good, but not great, to support a great wine tasting experience.



“I’m not a connoisseur”

Allure of “big wineries”

Larger wineries are very appealing for several reasons:

- They are popular (popular = good)
- Diverse offerings
- Easy to locate
- Safety in selection
- Quality of wine
- Increased likelihood of finding favourite wines at a local store

Allure of “small” wineries

Small wineries offer unique experiences that may not be available elsewhere:

- Opportunity to connect – to surroundings, the wine, and the staff
- Fewer distractions
- “Homely” feel – provides warmth and comfort
- Relaxation and rejuvenation
- Rare wine experiences
- An “exclusive” or “secret” experience

“Very small, intimate, not overcrowded. It makes the experience special.”

“It’s like we’re just sitting here in
someone’s backyard drinking some wine.
It’s incredible, it’s like a secret place.”



Importance of staff

Staff are vital to the success of a winery visit.

- Knowledgeable staff can enhance the wine touring experience. This includes knowledge of the wine, but also of the winery story/history.
- Passionate staff create passion for the wine and the winery.
- Consumers feel more connected to the winery itself when staff engage with them.

For Enthusiasts, it is the winemaker or owner that makes the biggest difference. For Experiencers it could be any member of staff.

Additional elements that enhance the experience

In addition to selection of wines and connection to ones surroundings, there are several other elements that may help elevate the wine experience:

- Views
- Culinary experiences
- Unique stories
- Personality – of the winery and staff
- Uniqueness
- Atmosphere and mood

Stimulating the senses

Wineries that stimulate our sensory receptors create stronger experiences

Touch The grapes, the wine glass

Smell The fresh air, wine and food

Taste The wine and food

Sight The view and architecture

Sound The energy of the staff and customers, sounds of the surroundings
(i.e., birds chirping, dogs barking, etc.)



“The epitome of wine touring is when you experience a sensory overload.

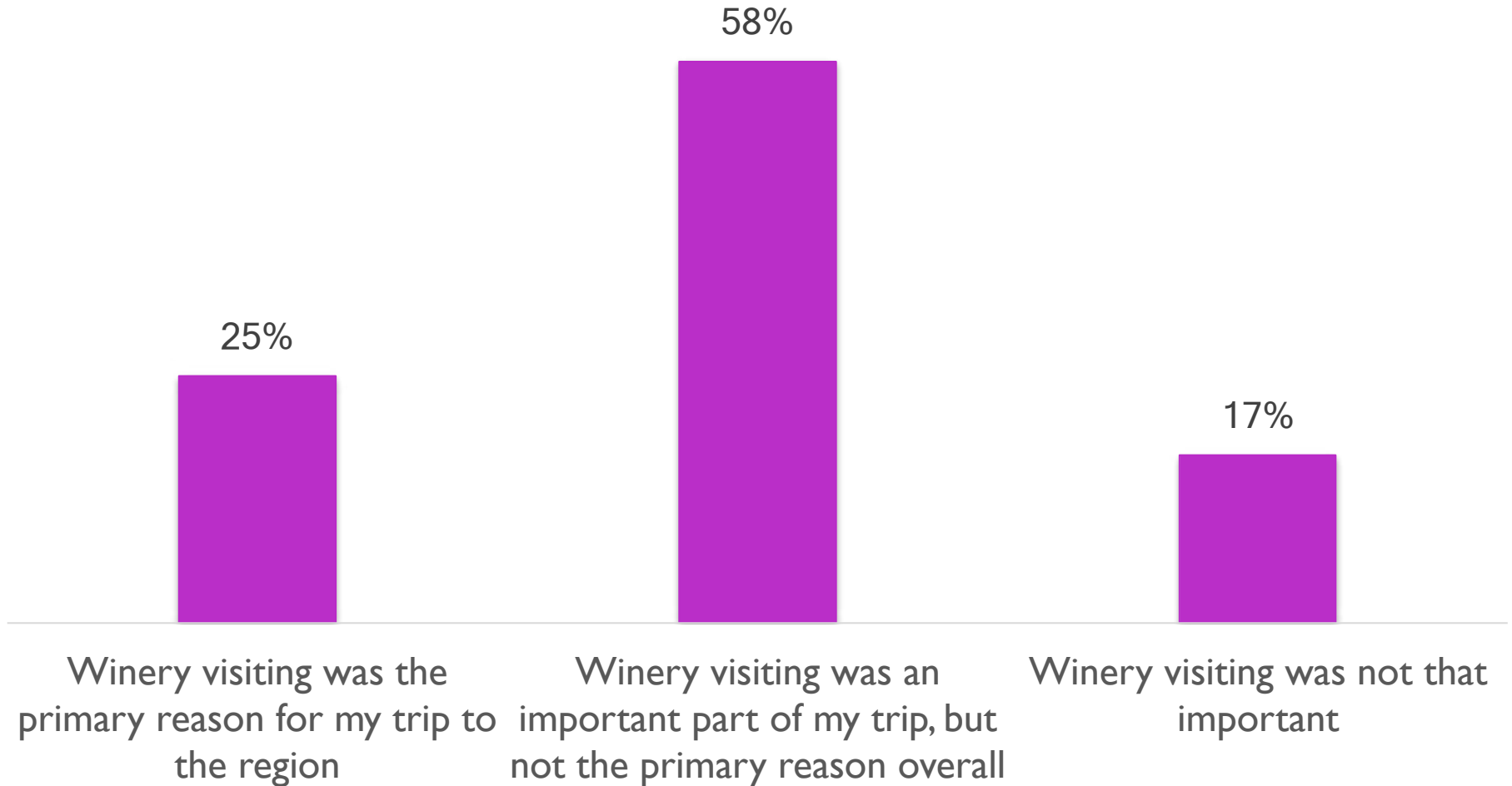
The view stimulates your eyes and the wine stimulates your taste.”



VISITOR JOURNEY



Importance of wine in the trip



High yield wine primary visitors

	Winery visiting was the primary reason for my trip	Winery visiting was important, but not the primary reason	Winery visiting was not important at all
Number of bottles purchased **	7.53	5.97	3.48
Number of wineries visited **	3.69	3.43	1.71
Likelihood to recommend BC wine touring (0-10 scale) **	8.23	8.34	6.93
Overall rating of the wine touring experience (1-5 scale) **	4.16	4.11	3.55

Note: ** indicates statistical significance at $p < .05$; * indicates statistical significant at $p < .10$

Matching behaviours to tools used by journey stage

BEHAVIOURS

- Enthusiasts – wine primary reason
- Experiencers – wine a secondary reason
- Decide to wine tour
- Allocate time to wine tour
- Conduct some winery research
- Confirm time
- Conduct some winery research
- Choose anchor wineries
- Maybe choose others
- Make lunch reservation
- Pick route
- Choose impulse stops
- Drink wine & reminisce
- Tell stories about the trip and the wineries visited

Choose destination

Pre-trip planning

In destination

The day

Post-trip

- Destination imagery
- Destination stories
- Word of mouth
- VFR
- Social media postings

- Website
- Overall destination information
- Wine touring information
- Word-of-mouth
- Social media postings

- Mobile web
- Brochures
- Word-of-mouth
- Social media postings

- Navigation apps
- Mobile web
- Way finding
- Winery recommendations
- Brochures & maps
- Social media postings

- Drinking the wine
- Visiting the liquor store
- Social media postings

TOOLS

1 in 4 travellers use the Wines of BC website.



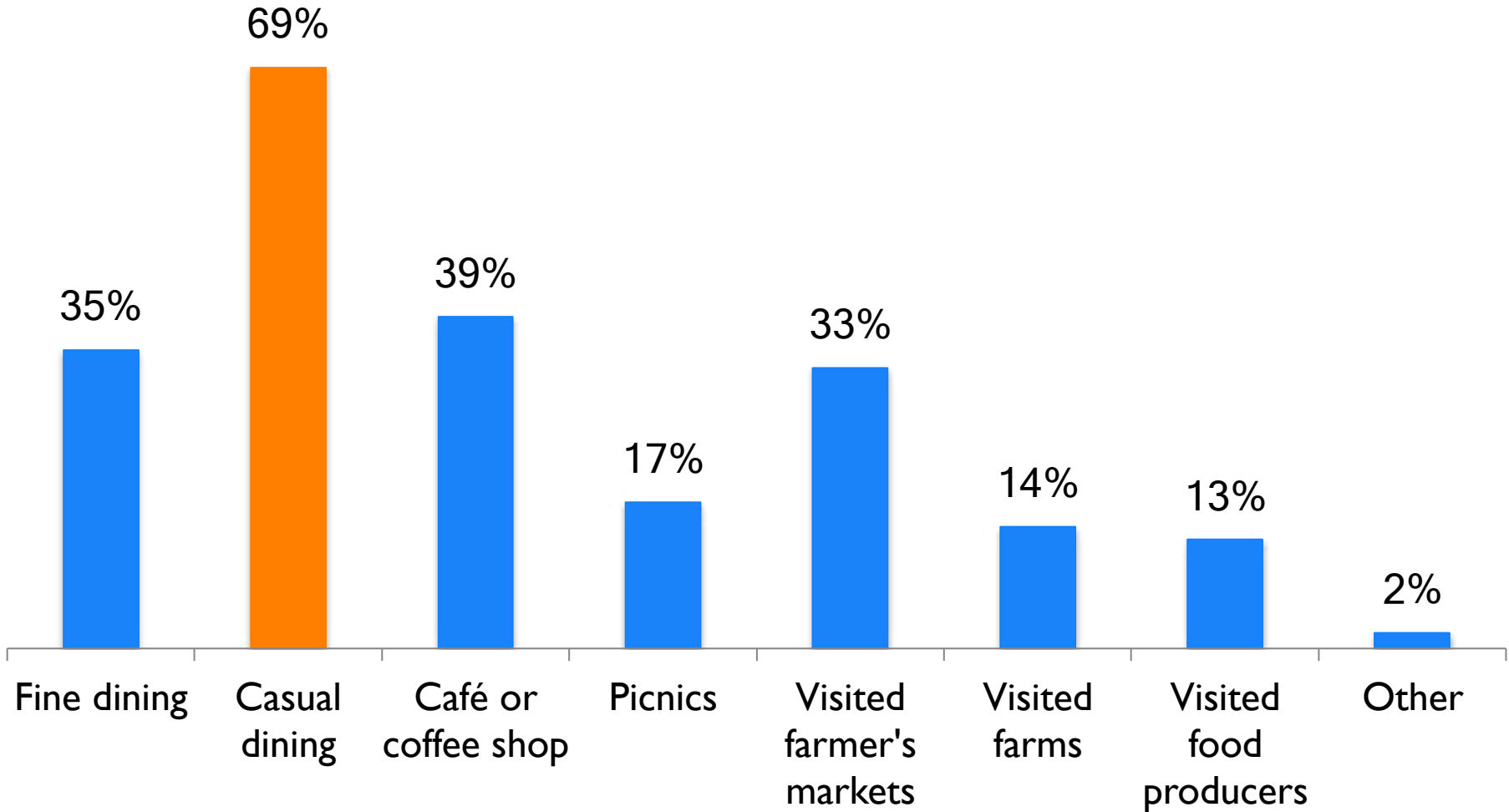
JOIE FARM WINERY

Tasting Room

+
Picnic

CULINARY

Varieties of culinary experiences:



BREAKING NEWS

A group of people are gathered around a table, clinking wine glasses in a toast. The table is set with several white bowls containing different types of food, including olives, tomatoes, and a dish with cheese and herbs. The background is slightly blurred, showing more people and glasses, creating a social and festive atmosphere. The text "Culinary improves wine tourism!" is overlaid in the center of the image.

Culinary improves wine tourism!



number of culinary
experiences



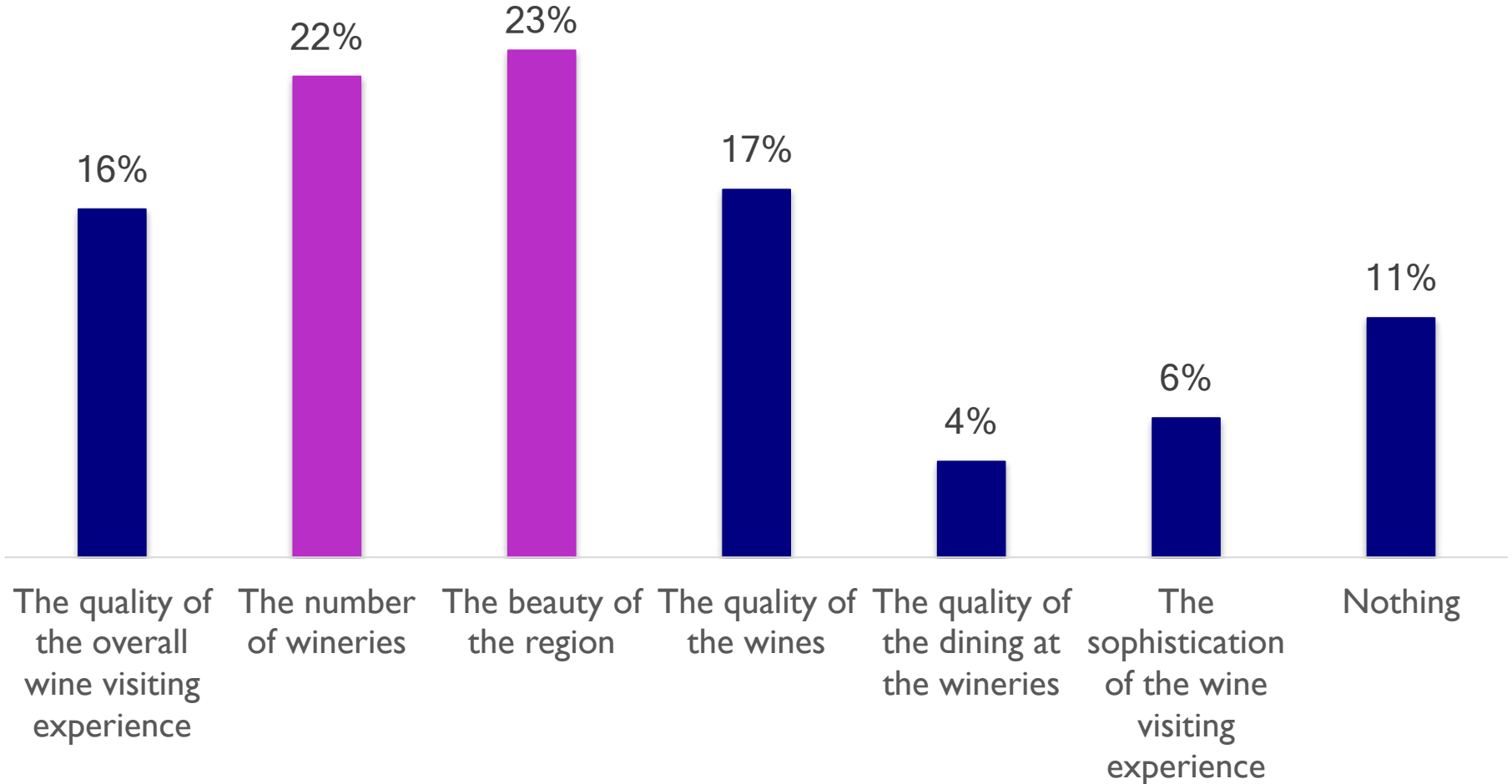
Overall wine touring experience

Likelihood to recommend

Trip rating vs other BC trips

Trip rating vs other global trips

What surprised you the most about your wine touring?



A hand is holding a glass of red wine, which is partially filled. The glass is positioned over a wine tasting sheet that is laid out on a dark surface. The sheet contains several sections for notes, including 'The Aroma', 'Sp and Linger', and 'Rate it'. The text 'KEY OPPORTUNITIES' is overlaid in the center of the image.

KEY OPPORTUNITIES

Wine enthusiasts are your core customer.

Wine experiencers are the largest market segment and the biggest growth opportunity.

We can get more winery stops from current visitors.

Culinary, beyond the wineries, enhances the overall wine touring experience.

Locals are very influential, but generally have a small set of wineries they send their visitors to visit.

Impulse stops are prevalent and wineries must be able to capture them.



THANK YOU
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