



Wine Marlborough Annual Member Survey 2023

Summary of Results

Background

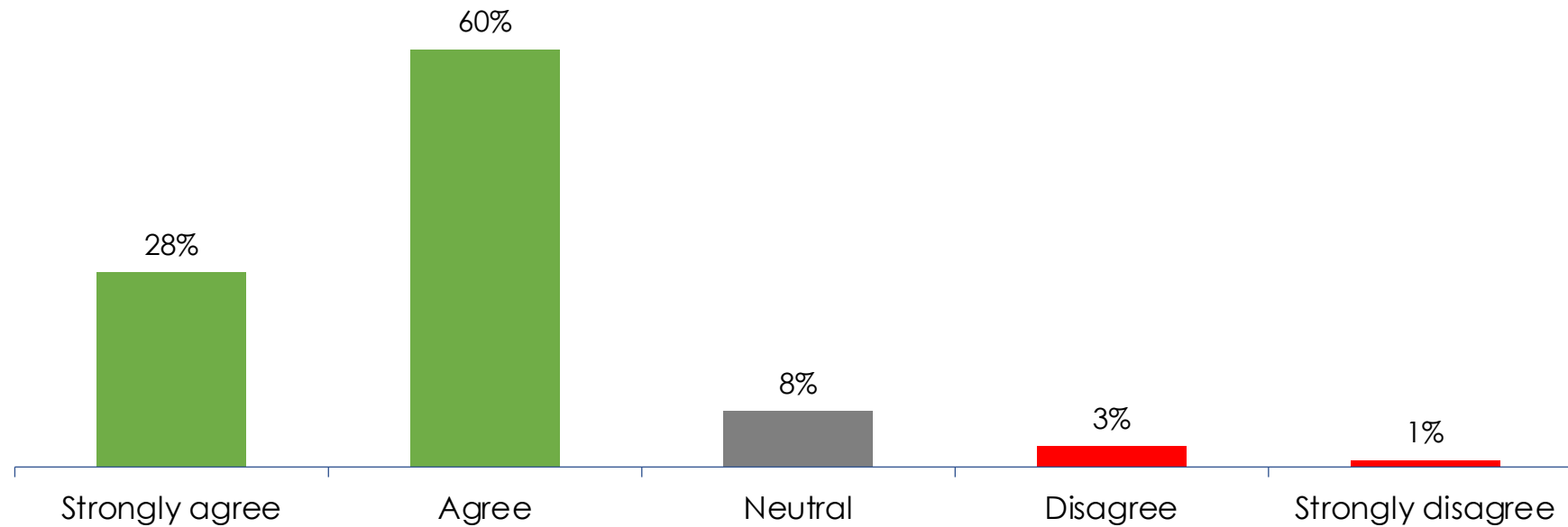
- Wine Marlborough (WM) is the regional industry association for the Marlborough wine industry representing 531 grape growers and 159 wine companies. The Marlborough wine industry accounts for approximately 80% of New Zealand's wine production, over 20% of Marlborough's GDP and one in five jobs in the region.
- WM, a subsidiary of Marlborough Winegrowers, a not-for-profit organisation is driven to create value for its members. Its purpose is to proudly stand up for, and build, the reputation of Marlborough's wine region.
- **In late January to early February 2023 a survey was conducted to help WM capture feedback from its members to understand their needs, review its activities and to inform its next planning cycle.**
- The survey was conducted by independent consultants, Q & A Research, and all information was anonymous.
- 70% of the survey respondents were business leaders and the survey was completed by:
 - 32 growers
 - 51 wine company representatives
 - 25 associates/partners/stakeholders of Wine Marlborough



Agreement with WM Strategy & Purpose

Agreement with WM's Purpose & Strategy

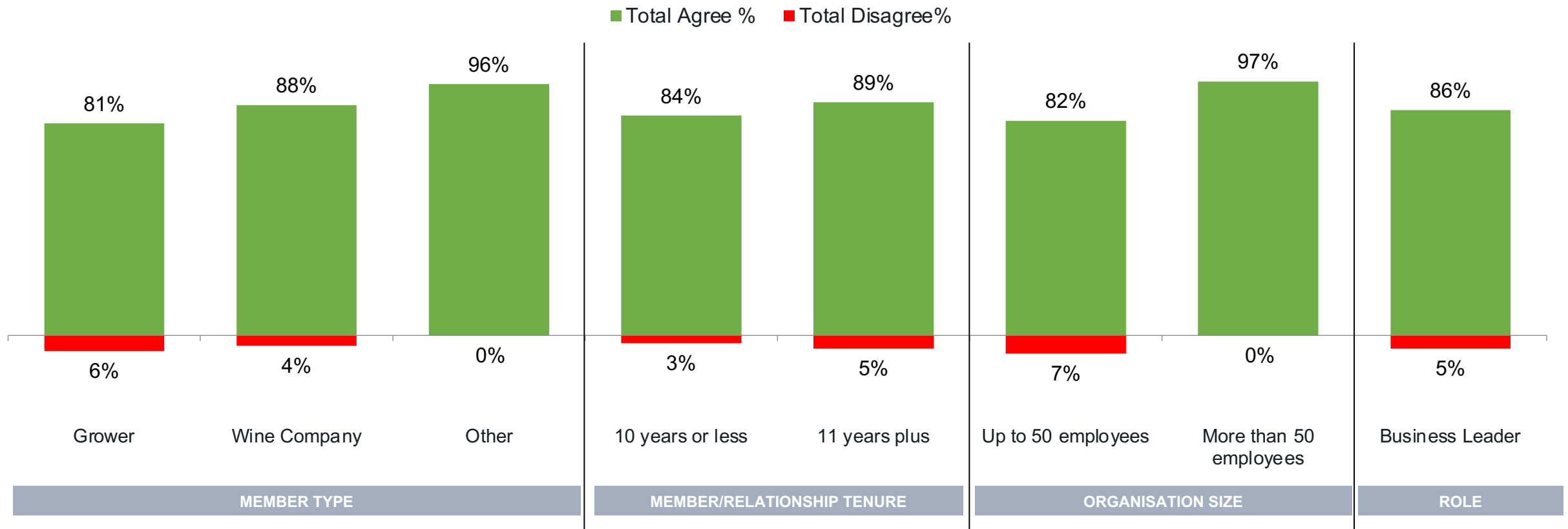
88% of WM's members and stakeholders agree they understand the purpose and strategy - 4% disagree and 8% feel neutral



[Wine Marlborough Strategic Plan Overview to 2023](#)

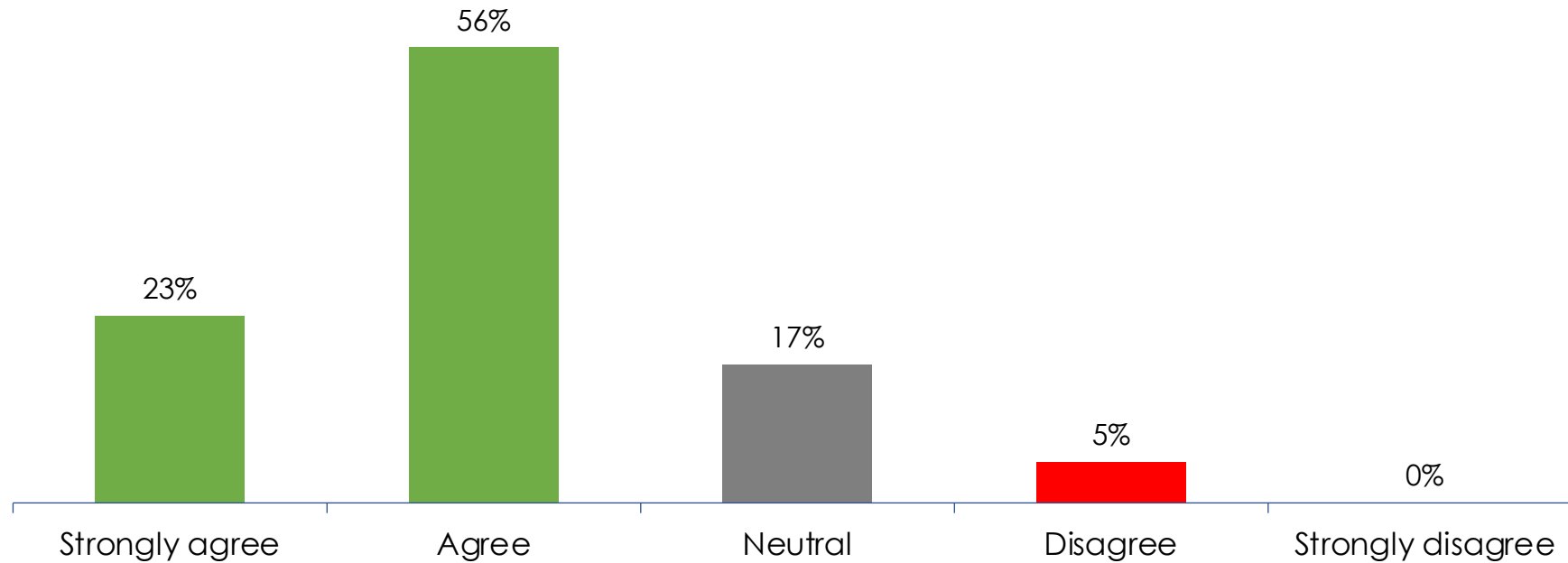
Agreement with WM's Purpose & Strategy

Agreement highest among WM's associates/partners/other stakeholders and larger organisations
 Lower among growers, smaller organisations and business leaders



Agreement that WM Events Help Members

Agreement WM events are used to help Members shine, sell and create relationships is lower at 79% with 5% disagreeing and 17% neutral



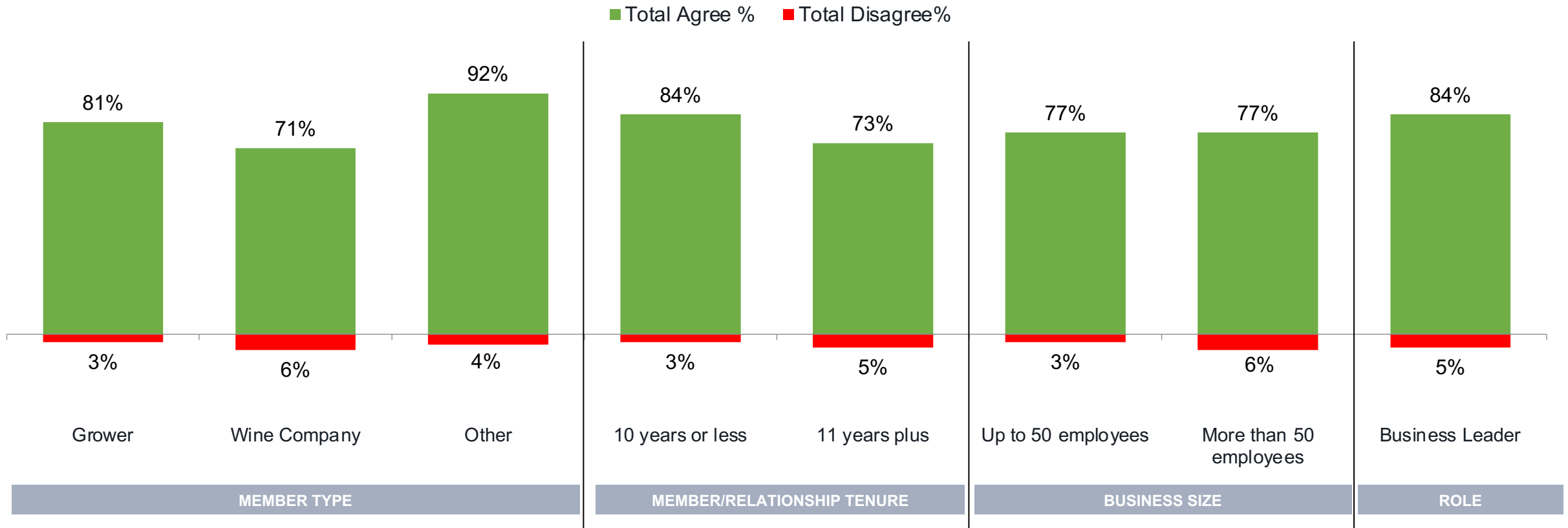
Base: Total sample N=108

Q. And how much do you agree or disagree: Wine Marlborough's events are used to help Members shine, sell and create relationships?

Agreement that WM Events Help Members

Agreement highest among WM associates/partners/other stakeholders, among those who have had a relationship with WM for less than 10 years and those in a business leadership role

Lower among wine companies and those who have had a relationship with WM you for more than 10 years



Base: Grower N=32, Wine Company N=51, Other N=25, 10 years or less N=32, More than 10 years N=63, Up to 50 employees N=35, More than 50 employees N=60, Business Leader N=76

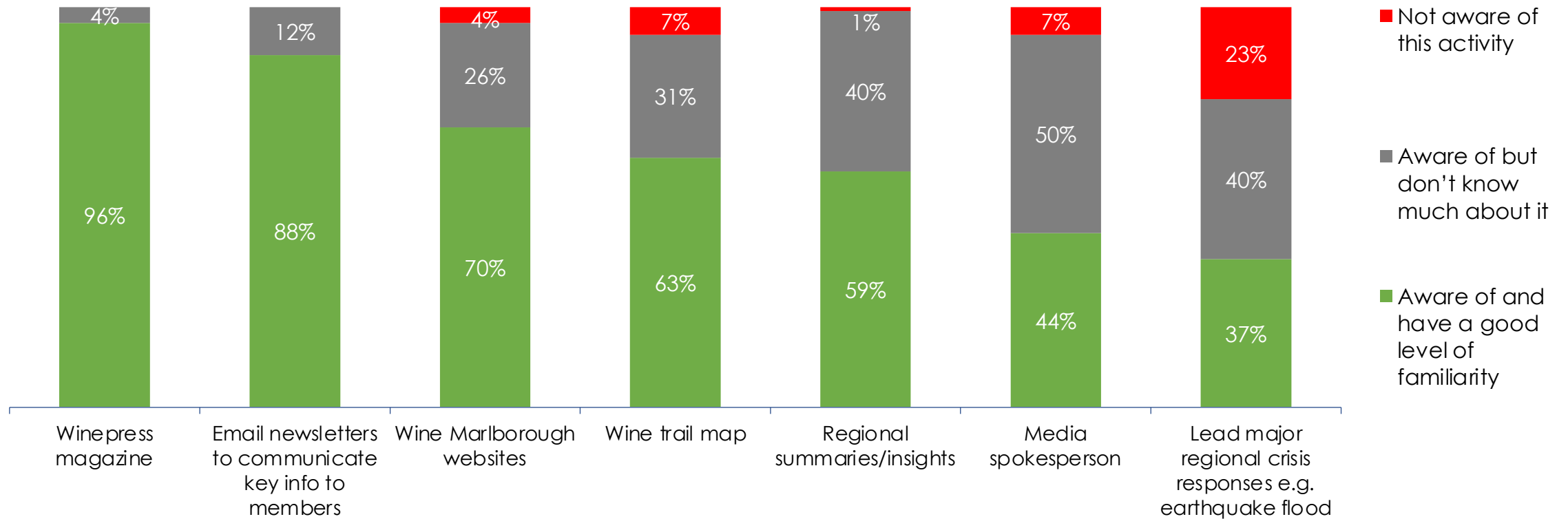
Q. And how much do you agree or disagree: Wine Marlborough's events are used to help Members shine, sell and create relationships?



Awareness of WM Activities

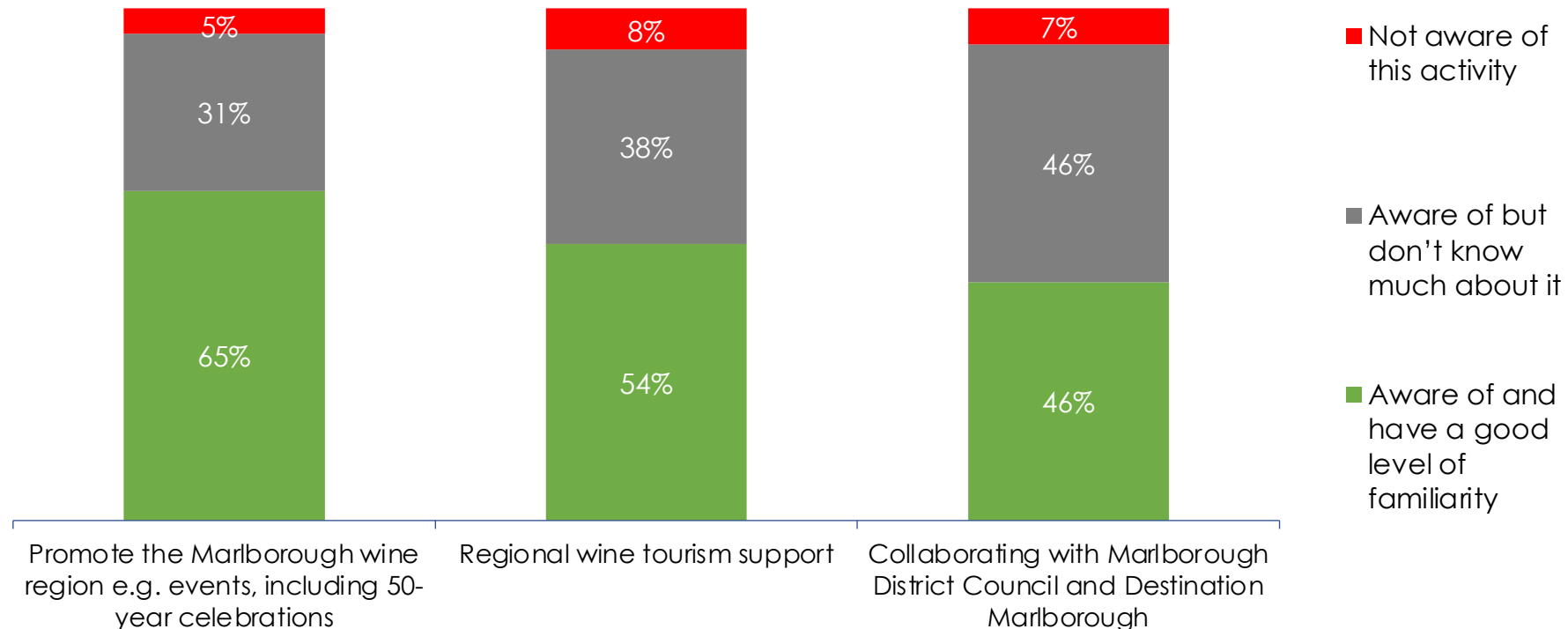
Awareness: Communications

High familiarity with Winepress magazine and email newsletters but only half or fewer of WM's members are familiar with WM's Regional Summaries, and Media Spokesperson and Lead Major Region Crisis Responses



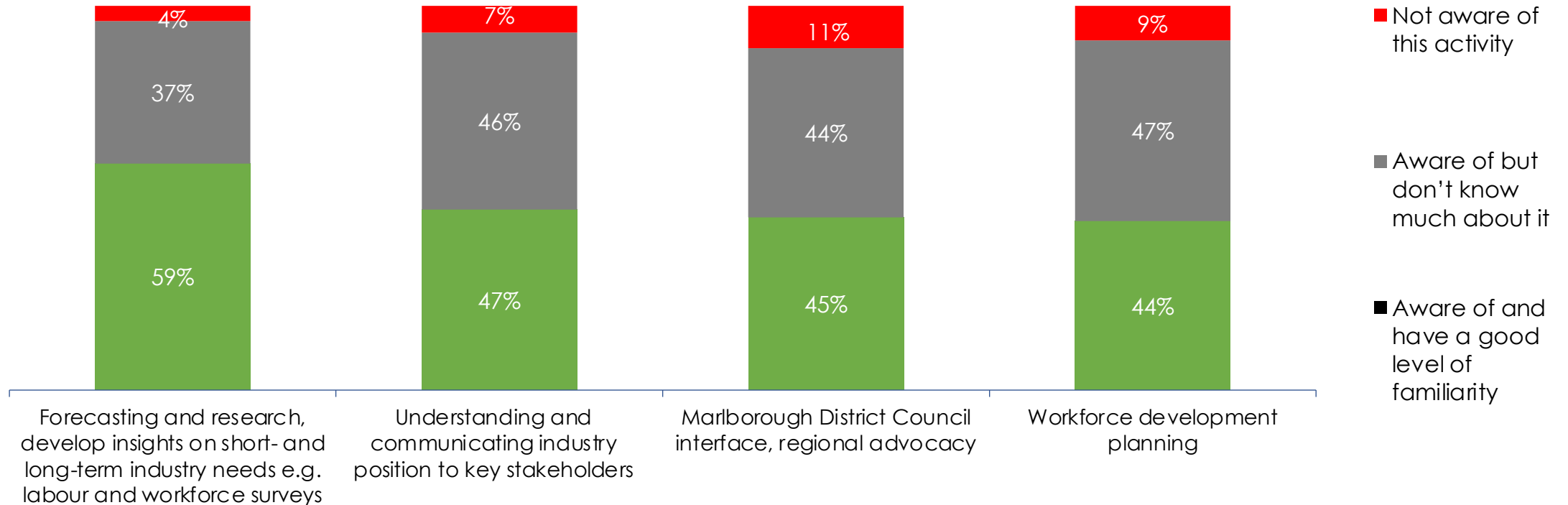
Awareness: Marketing

Between two-thirds and a half of members have a good level of familiarity with WM's marketing activities – half know WM collaborates with the Council and Destination Marlborough but not in any level of detail



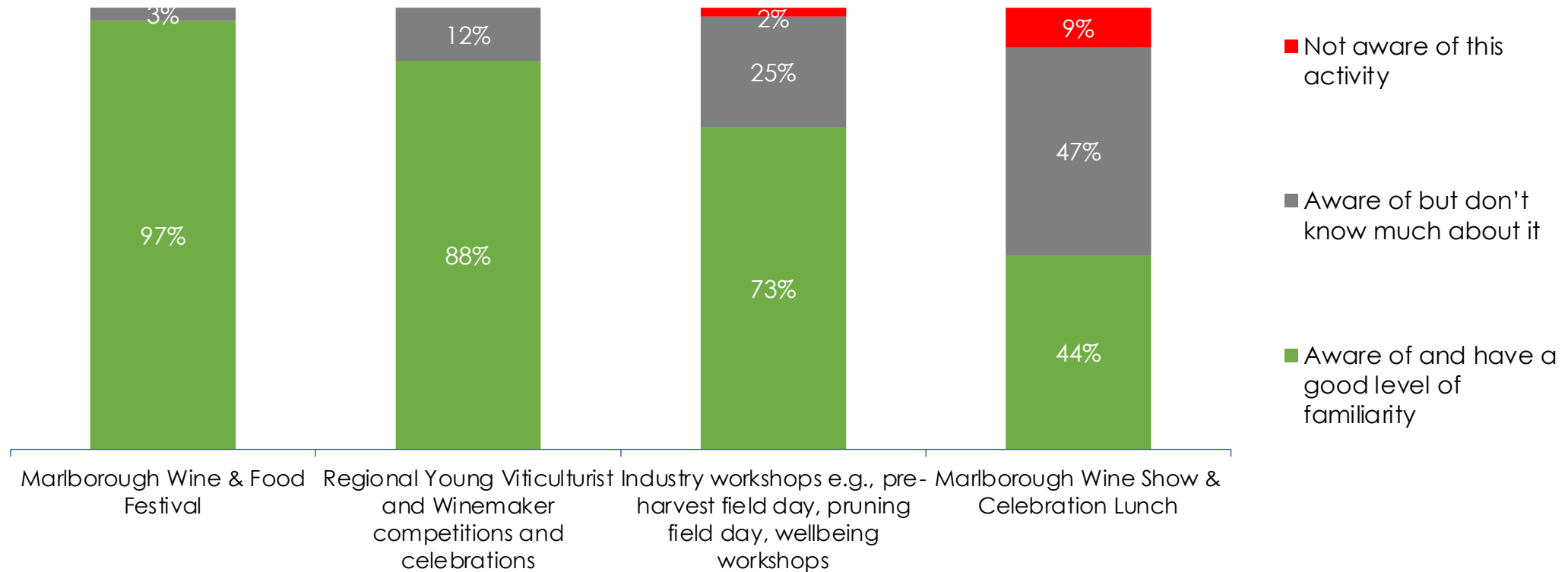
Awareness: Advocacy

Awareness highest for forecasting and research but across all areas between 40-60% of our members don't have a good level of familiarity with any of the details of WM's advocacy work



Awareness: Events

A quarter of WM's members are not that familiar with WM's industry workshops and more than half have no familiarity with the details of the Marlborough Wine Show & Celebration Lunch

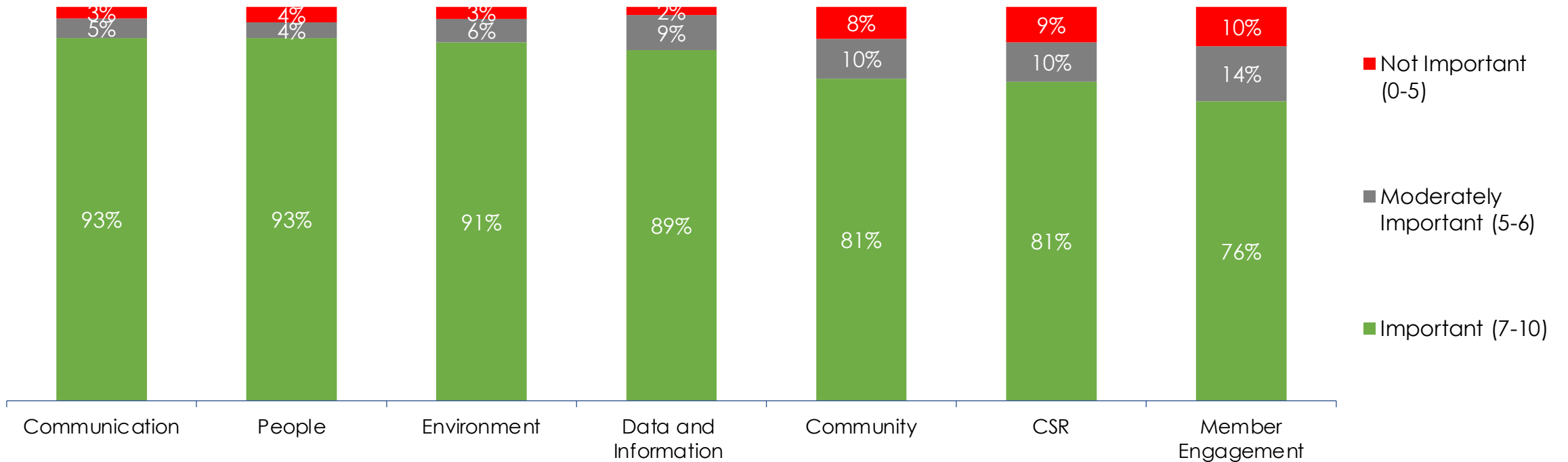




**Our 2022-23 Focus Areas:
Perceptions of Importance & Performance**

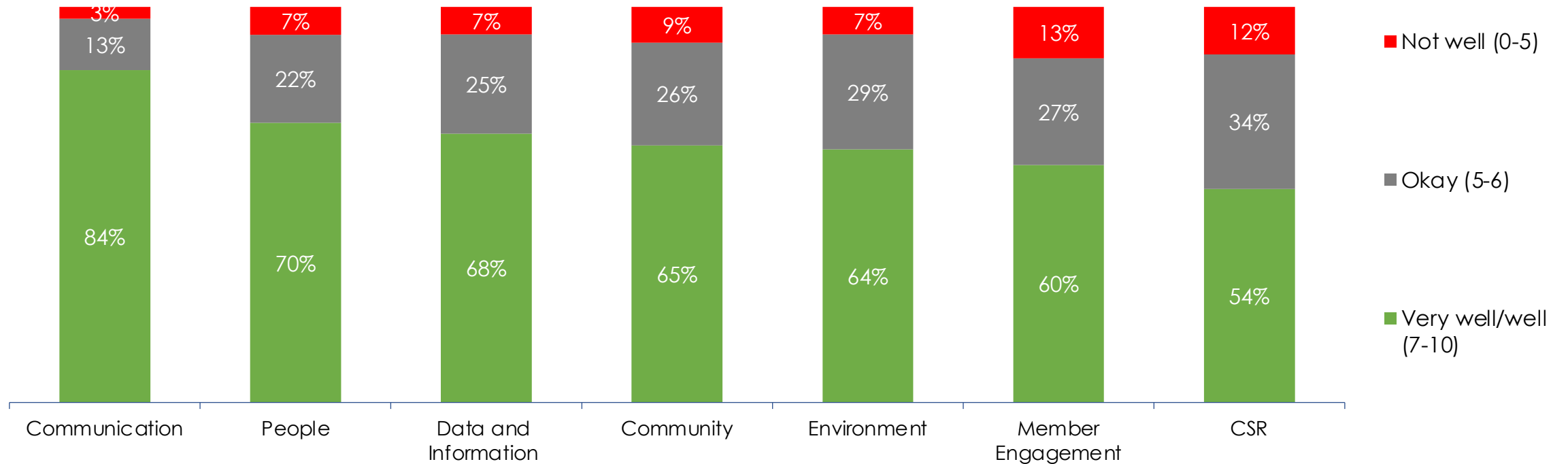
Importance Ratings

All WM's focus areas for 2022-23 rated as highly important by three quarters or more of its members and stakeholders with Communication, People and Environment rating as most important and Member Engagement as least important



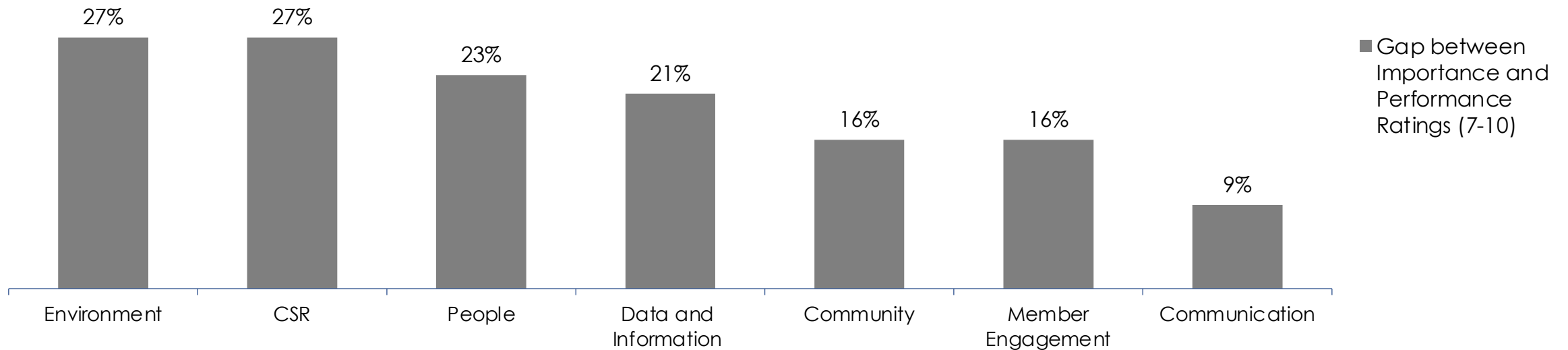
Performance Ratings

For performance WM are rated highest for Communication and People (the areas that rate the highest for importance) and lowest for CSR and Member Engagement (the areas that rate a little lower for importance).... Environment rated 3rd most important but only 5th for performance



Importance and Performance Gaps

Largest gaps between rated importance and performance are for Environment and CSR where WM are not meeting the expectations of just under 3 in 10 members



Suggested Improvements: Communication

16 comments – 84% rated us as performing ‘very well’ and 3% ‘not well’

Use a range of channels – not just email



“Communication is hard, we have members that are up on the latest tech and others that are still in the age of paper... need to be aware of your audience and make sure that you are catering to all.” *(grower)*

“Email is good, but only some read it. We are all clambering to be heard.” *(partner/stakeholder)*

“All by mail and social media, but this is basically what you do already.” *(wine company)*

More face to face/ individual contact needed



“Get out more and meet the wine people on their own turf and listen to their needs and communicate what Wine Marlborough does on a daily basis.” *(other)*

“Okay but need to have more contact with individual members to ensure we are all playing from the same song book.” *(wine company)*

Increase profile and reputation



“I think that MW could be described more as a marketing entity than a lobbying entity so based on that view, I would suggest you do a good job of singing your own praises.” *(wine company)*

“More communication with wider community to build reputation.” *(wine company)*

Positive feedback



“As the face of the local industry I think Wine Marlborough does a fantastic job of presenting and promoting a professional, passionate view for all aspects of the industry within the region.” *(associate)*

“More than happy with the communication.” *(wine company)*

“You are doing better. I feel like I know a bit more about what is going on than I did several years ago. So thanks for that.” *(grower)*

Suggested Improvements: People

22 comments – 70% rated us as performing ‘very well’ and 7% ‘not well’

More work needed in RSE space



“I don't think that enough is being done to ensure the fair treatment of RSE workers.” *(grower)*

“I think we are a little in the dark about how contractors are treating RSE workers. We are paying a high hourly/piece rate yet we hear that workers have to pay for transport, clothing, showers, etc - truth or fiction?” *(wine company)*

“Help piece together solutions. We all know the facts, but we need someone to take action. For example, we need to face into the reality that we rely on RSE and overseas workers. Vineyard work, all wineries are being held to ransom by labour operators that control the labour, we don't have enough accommodation in Marlborough to allow more RSE so work with central government and the MDC to find a solution...” *(wine company)*

Be more proactive in finding workforce solutions



“Perhaps you could be more proactive with the challenges with bringing people into the region for work.” *(wine company)*

“The new workforce planning initiative will make real change, where it is needed. If politics don't dilute the impact it could have. WM need to lead this for Marlborough...” *(partner/stakeholder)*

“Engage directly with our employees on site to talk to them about opportunities, wellbeing etc.” *(wine company)*

Positive feedback



“Amazing work with RSE etc...” *(wine company)*

“Big topic and always more to do in this space. But some really good conversations are taking place. Hard to do a lot within this space with limited resources and capacity within team.” *(supplier)*

“Getting better! People are a huge focus - without people willing to show up each day, we don't have an industry, or production line, or bottling, or transport, or frost fans...” *(grower)*

Suggested Improvements: Data & Information

17 comments – 68% rated us as performing ‘very well’ and 7% ‘not well’

More detailed data wanted on a range of topics

e.g. weather, disease, sprays, market trends, latest innovations, trials, harvest volumes, vineyard maps



“I would like more information on weather occurrences, botrytis periods etc , but perhaps this is a job for individual wine companies to deal with their clients. It would be difficult and expensive to maintain the accuracy for this. I think you are probably doing okay.” *(grower)*

“More detailed data. For example, numbers required for vintage in each different role (not just overall numbers).” *(wine company)*

“Would be great to see industry innovations or trials from outside Marlborough new technology or trials being carried out elsewhere in the world that might advance what we do locally in the present or future.” *(associate)*

“Not sure if you do provide data in a format that members can source and use? I would like to research back harvest volumes from the last 20-30 years if I could. If you could provide a data library for members to source both current and historical information that would be a go to. Currently NZ wine is a go to, I don't see WM being a source of commercial information for members.” *(wine company)*

Positive feedback



“Very impressive what you already do.” *(wine company)*

“Data is king - we don't know, what we don't measure. We are unique in our thanks for taking a regional focus.” *(grower)*

Suggested Improvements: Community

29 comments – 65% rated WM as performing 'very well' and 9% 'not well'

More events needed to engage community



"With events like the wine show and the festival people outside the industry get involved which is always a help to interface with the wider audience." *(grower)*

"More events that give back to the community. This will help build the industries reputation which gets a bad rap from a lot. This could be driven from WM and supported by wine companies..." *(wine company)*

"Give new wine businesses a spotlight at an event." *(wine company)*

Broader engagement needed on different topics (not just events)



"Great events - but what else and how else do you build/ represent/ engage with community so that the region retains it's license to operate?" *(partner/stakeholder)*

"Aware of interaction with Destination Marlborough and also media focus on RSE workers and associated challenges but need more direct communication on other areas such as irrigation and water resources, future planning for climate change effects, etc..." *(wine company)*

Build greater understanding of the industry



"I'm not sure if the public or our community really understand all that there is inside our industry. There are SO MANY jobs, and cool ones - I think we lack getting to the kids and their parents early for example." *(grower)*

"Would love to see more engagement with the schools. We attended a spray drift presentation and survey last year by 2 students at the Girls College who were supported by SWNZ but that was the only industry body involved... felt this was a missed opportunity..." *(associate)*

"Search for ideas and initiatives that benefit the community." *(wine company)*

Positive feedback



"Doing fine in my mind." *(wine company)*

"Great to see MW Press articles reproduced in local newspaper. Positive good news help strengthen perceptions of our industry as employment pathway." *(grower)*

"The CD steering group is great, South Marlborough Wine Group - fostering community! Keep supporting the small regionalities as these groups will fade without support. Communities working together is a logical and fundamental way of increasing achievement of all sorts..." *(grower)*

Suggested Improvements: Environment

29 comments – 64% rated WM as performing 'very well' and 7% 'not well'

Share examples of success stories to motivate and encourage



"Keep publishing examples of good projects done by local companies to show to other wineries/growers what can be achieved." (grower)

"I'm not sure that WM is aware of the individual programmes wineries/vineyards are undertaking and little communication of these undertakings to the wider community." (wine company)

"Articles on vineyards doing a good job planting, recycling and contributing time positive encouragement to us all." (grower)

Unsure what WM is currently doing / role ?



"I am sorry I am not sure what you are doing in this area right now. I know my SWNZ audit had a heap of new things in it, so I assume you are doing that too?" (grower)

"I'm not sure what Wine Marlborough is doing on this (I'm sure lots), I need to look into it more - but this is essential to our future." (grower)

"Where does WM play - that is not SWNZ or again external consultancies? if this was clear it would be great." (partner)

Other...



"Your focus to me reads about marketing the successes rather than actually helping develop solutions. Do you share the failings? Without being overly critical, running a seminar with an invited guest 2 weeks before harvest (2022) starts looks more of a token effort. At that time of the year people are focused elsewhere and the ability to influence any operational solutions is equally minimal..." (wine company)

"Perhaps take more of a leadership role on the various environmental issues the industry faces." (wine company)

Positive feedback



"The field days they have in Marlborough on wetlands etc. are great." (grower)

"I think it is good - when it comes to events, I think in terms of merchandise and resources - maybe keeping those in line." (grower)

"Not much to improve to be honest." (wine company)

Suggested Improvements: Member Engagement

29 comments – 60% rated WM as performing 'very well' and 13% 'not well'

More personalised / informal (face to face) contact



"Need to get out and about more - meet for coffee and chat with members on regular basis." *(wine company)*

"Gathering feedback in ways other than just email - it never feels very personal." *(grower)*

"Members are hard to get in touch with, however some of the smaller workshops are a good way to get engagement." *(grower)*

"Find out where we are struggling. a lot of pressures coming from everywhere it feels like right now." *(grower)*

More written contact (e.g. newsletters, updates)



"Maybe use of newsletter programmes, simple but clear headers on emails/ newsletters, some standardised aspects that carry continuity and immediate recognition, and then changeable aspects that engage..." *(grower)*

"More communication of key strategies and progress towards achieving them." *(wine company)*

"Make more effort to invite comments on email that members might be passionate about." *(grower)*

Have a louder voice - leverage our size



"Improve WM's voice (and strength of voice) at communicating members needs. Get members to directly and strongly engage with our out of touch national body and other institutes." *(partner/stakeholder)*

"...To champion the Marlborough industry, I would think that WM should take a more direct approach given the size of Marlborough in the grand scheme." *(wine company)*

"Marlb is 80% of NZ wine industry. Problem is so much of this is run from out of town (AKL or international) or are very large business with little engagement in Marl..." *(wine company)*

Positive feedback



"You're doing a damn fine job, keep it up." *(wine company)*

"Think it's okay. It's up to individuals and businesses to get involved." *(wine company)*

"Our needs are met but I always get feedback from growers and small producers that things can be improved. It's always going to be a tricky one to meet the needs of everyone." *(wine company)*

Suggested Improvements: CSR

19 comments – 54% rated WM as performing 'very well' and 12% 'not well'

Confusion about WM's role in CSR space



"Tough one, should be companies responsibility." *(wine company)*

"I don't think it needs to." *(grower)*

"Not really sure on this." *(wine company)*

"Question is whether Wine Marlborough needs to or should set a regional framework or set of standards for CSR, the larger companies should have this in place already. But then what about the mid to smaller sized companies? CSR is something all companies should work on developing, so is a protocol from the regional representation useful? Not sure." *(grower)*

"I don't know enough. WM doesn't visit my business to engage/ consult/ advise on this. There are all sorts of consultants in this space. What does WM do and how do they fit within this ecosystem?" *(partner/stakeholder)*

Share more information to help Members with CSR



"Potentially share more in newsletter of various winery's CSR activities." *(grower)*

"Organising webinars, new wines promotion, offer a mentor for a year if you need guidance in one of the many aspects of CSR." *(wine company)*

"Easier access for information for everyone." *(wine company)*

Positive feedback



"This is an important issue and it is difficult to keep up with changing criteria. The COVID information was great - it had been deciphered into layman's terms and was easy to enforce. Concise summaries with reference to where to get further information would be useful." *(wine company)*

"I think there is good intention and engagement in this space, like most things, could do more with access to more funding." *(supplier)*

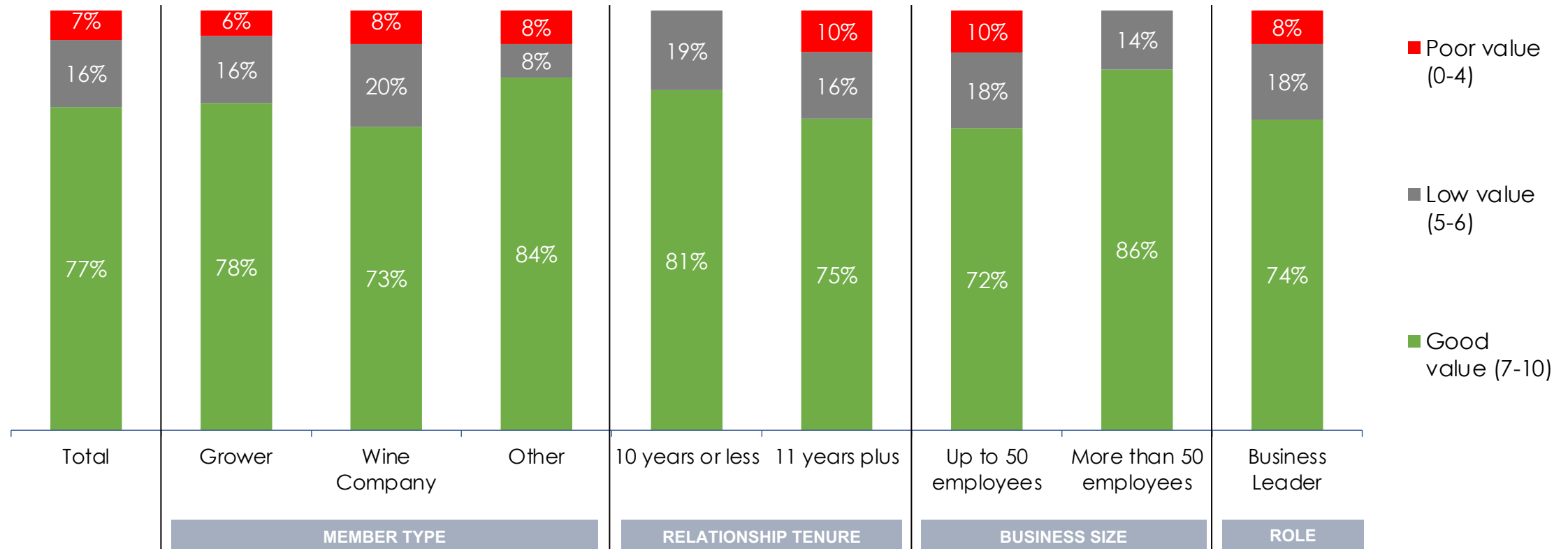
"I'm sure WM is doing lots in this area, I just haven't explored it." *(grower)*



Overall Value & Future Needs

Rating of Overall Value

WM deliver highest overall value among our associates/partners/stakeholders and larger organisations. Lower among wine companies, those who have a 10+ year relationship with us and business leaders



Reasons for Poor or Okay Value

Rating of 7-10 (76 comments)

Poor Value – not enough relevant engagement

(rating of 0-4, 7 comments)



"Little and late communication or no response in times of crisis. Often only pick things up when forced to by members. Not pushing back hard enough against NZ wine and their Auckland centric focus." (wine company)

"I find most of what Wine Marlborough does to be irrelevant to our business of making and exporting wine." (wine company)

"I'm not sure what this is costing me at the moment. However I still believe the levy is too high. Biosecurity is the single most important issue. And the research." (grower)

"Little engagement on a personal business level from the organisation." (wine company)

Okay Value – good at marketing but need to increase advocacy and have a louder voice...

(rating of 5-6, 14 comments)



"Good at marketing but need to develop more teeth in the lobbying department." (wine company)

"Wine Marlborough does amazing work in many different areas; it needs to improve its participation and involvement in areas such as social responsibility, community, environment, diversity and people." (wine company)

"I feel like the interaction between WM and NZWG is not clear and should be better defined. WM should play more of an advocacy role for the Marlborough region within national wine conversations (I feel Marlborough gets less share of voice than it should in national marketing/promotion). WM's impact is diluted because of the need for political correctness..." (wine company)

"Marlb 80% of wine industry. We should have more representation and NZWG activity in Blenheim." (wine company)

"I think it important but at this stage I'm not quite sure what we are getting from being a member. Perhaps send out a letter or email to explain exactly what Wine Marlborough does and aims to achieve." (wine company)

Reasons for Rating as Good Value

Rating of 7-10 (65 comments)

Good communication / information



“Communications are timely and informative, relative to the time of season.” *(wine company)*

“Valuable information... great representation of Marlborough wine industry.” *(wine company)*

“I highly value the over-arching role of information gathering, evaluation and then communicating to the local and wider NZ and global community.” *(wine company)*

“Good communication on realistic important topics...” *(wine company)*

High level of engagement



“I feel engaged with Wine Marlborough. I know they will receive my calls and address any questions I have. I find their services and products important to my business and the local industry.” *(wine company)*

“Communication and engagement is great and is a fundamental part of enjoying this industry.” *(wine company)*

“I find WM very proactive, engaging and beneficial for keeping up to date about the industry and its wider issues.” *(supplier)*

Team – small but hard working, friendly, approachable, impactful



“The team are very approachable and are open to listening to challenges and new ideas.” *(wine company)*

“Wine Marlborough do a great job promoting our industry given they are a small team. Keep it up.” *(wine company)*

“I think the team does a very good job promoting our industry in this region, with the resources and scale that they have.” *(grower)*

“It is the best form of communication that connects with all growers. Wine Marlborough represents every aspect that affects our livelihoods.” *(other)*

Good events



“Good events, good projects on the go. Communicated well e.g. Covid response, RSE labour shortage etc.” *(wine company)*

“I think Wine Marlborough provide good resources and events in the spirit of Marlborough wine.” *(wine company)*

“The events are great, and also essential to any self respecting wine region!” *(grower)*

Feedback on Areas WM could Focus On

(61 comments)

Workforce / RSE



“Accommodation standards for RSE, and the usual problem of identifying and eliminating cowboys...” *(grower)*

“Anything RSE, because it is going to affect our reputation and social licence to operate. This includes accommodation supply, as it is such a noose for growth in Marlborough.” *(grower)*

“Continue with the ethical labour workforce initiatives.” *(other)*

“Focus on getting more RSE Labour in to the district.” *(wine company)*

Environment



“Biosecurity, research, residues.” *(grower)*

“R&D into vine health.” *(wine company)*

“Finding viable, sustainable and affordable solutions to increasing challenge of winery waste disposal and carbon reduction.” *(grower)*

“Research into capturing and compressing CO2 from fermentation...” *(wine company)*

Education



“For us we are passionate about educating and helping growers improve there spraying practices...” *(other)*

“I wonder if new owners of small blocks of grapes have enough opportunity for hands on "training" of the season's cycle of pruning, growing, spraying and harvest. Supervised on the job learning...” *(grower)*

“I think the well-being focus this year was great - it would be good to highlight drug & alcohol abuse in the future...” *(grower)*

More promotion of industry / raising profile



“Probably more promotional activities domestically and internationally.” *(grower)*

“Continuing to promote Marlborough internationally.” *(wine company)*

“Engaging the community to attend wine events by collaborating with some other top producers like beer, cider etc. to the wine festival.” *(wine company)*

“Focus on attracting young people into the industry via school career choice options that could include regular open days at wineries and vineyards.” *(other)*

Biggest Concerns – What Keeps You Awake at Night?

(85 comments)

Climate change / weather / access to water



“Climate change - research and industry involvement for growing conditions and different techniques.” *(wine company, cat 2)*

“Climate change and impact on harvest yield and quality...” *(grower)*

“Weather and climate change. Increase focus on mitigation.” *(grower)*

“Water and waste. Next year will be a hard El-Nino for the first time in a long time and many vineyards and wineries are going to be caught out...” *(wine company)*

Labour shortages



“A growing industry, lack of people available locally, less and less young people attracted to our industry, the aging region pool of people, accommodation for overseas workers, and access to enough RSE to support all of the above-mentioned areas.” *(supplier)*

“Bloody labour. Not knowing if another Pacific issue is going to stop the guys from showing up.” *(grower)*

“Concern our government does not fully understand our industry labour requirements...” *(grower)*

Sustainability of sales / export markets



“Over supply, quality reduces, and the world loses a taste for SB.” *(grower)*

“Selling wine around the world with a supply chain crisis...” *(wine company)*

“Health issues impacting on levels of wine drinking around the world. Sustainability.” *(community)*

“We worked so hard in the 80's early '90's to have Marlborough SB recognised world wide as a premium product now it is slipping into the commodity range with focus on lower prices and bulk wine.” *(wine company)*

Corporate domination of industry



“That 30% of the industry is supplied by one company - never a good position.” *(wine company)*

“The increasing corporate growth of the Marlborough Wine industry. The fear that industry greed will actually destroy the unique environment within which we work and live.” *(wine company)*

“A shrinking industry grower base with large cooperate developments starting to dominate the landscape.” *(wine company)*

How Can WM Support Engagement & Participation?

(41 comments)

Provide more events and networking opportunities



“Continue to provide opportunities for members to attend interesting and useful workshops...” *(grower)*

“Encourage more informal chats to get members to open up about what's happening and what's relevant...” *(wine company)*

“Would be fantastic to have the opportunity to be involved with more events as a sponsor or volunteer.” *(associate)*

Increase face to face contact / encourage Member participation



“Have a meeting with each winery once a year... visit every single winery face to face.” *(wine company)*

“Come and ask me what I need occasionally!!!” *(wine company)*

“Organise and invite us to developmental / brainstorming sessions.... communicate on a more personal basis.” *(wine company)*

“Reignite your com's plan to awaken members. After a period, constant emails become noise and aren't given the attention they may need.” *(wine company)*

Keep up the good communication



“Just keep us informed.” *(grower)*

“Keep communicating.” *(supplier)*

“Keep up the good comms.” *(wine company)*

“Communicate better on key focus points and projects.” *(wine company)*

“Things are working well, and your communication is very good.” *(wine company)*

Lobby / advocate harder



“Maintain a strong relationship with central Government departments.” *(supplier)*

“Lobby MDC much harder.” *(wine company)*

“... lobby for more funding to give depth to team.” *(grower)*

“Advocate around supply chain costs and dry goods.” *(wine company)*

“Keep reaching out to wine industry organisations, wineries, growers & regulatory authorities to further communicate our position to them.” *(wine company)*



Key Summary Points

Key Summary Points

- Overall, Wine Marlborough is doing well in terms of its members and stakeholders understanding the organisation's strategy & purpose
- But, there is less alignment with Wine Marlborough's strategy and purpose among growers and lower agreement among wine companies that events are beneficial
- There is an opportunity to raise awareness and familiarity with Wine Marlborough's activities – details need to be brought to life via case studies and examples of specific projects
- The largest gaps in Wine Marlborough's performance on the 2022-23 focus areas are for Environment and CSR – Wine Marlborough are not meeting a third of member/stakeholder expectations in these areas
- There are also relatively large gaps for People and Data & Information (around a fifth to a quarter of member/stakeholder needs not being met)
- A key theme in feedback is that Wine Marlborough members want the organisation to advocate harder and have a louder voice given the size of Marlborough's share of the NZ wine industry

Key Summary Points

For the 2022-23 focus areas, key areas for improvement are:

- **Communication:** Wine Marlborough is doing well so keep going, use a wide range of channels, increase face to face
- **Member Engagement:** more personalised and face to face contact, more newsletters and updates, louder voice to reflect size of Marlborough wine region
- **People:** focus on RSE and labour shortage issue
- **Data & Information:** more please! (across wide range of topics)
- **Community:** more events and promotion, build understanding of industry at grass roots level (including schools)
- **Environment:** clarify Wine Marlborough's role in this area, share examples of success stories, motivate and encourage members
- **CSR:** lots of confusion over Wine Marlborough's role in this area and if it is needed at all – need to clarify and set a framework