

The cellar door as catalyst for wine consumption changes and multiplier of sales in the Australian wine market



FINAL REPORT to AUSTRALIAN GRAPE AND WINE AUTHORITY

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Please Note:

This final report in a series of three summarises the other two. The set is best read together for the fullest impact.

The interim reports are available from the AGWA (Australian Grape and Wine Authority) website; addresses are included in **Appendix 1: Communication**.

1. Abstract

This project develops a better understanding of wine consumers' purchase and consumption patterns before, during and as a consequence of their visits to winery cellar doors. This three-stage study found that the cellar door is a powerful catalyst to invoke change(s) in wine consumption. Cellar door visits influenced purchase during the visit, but the influence extended over the six months tracked after the visit. The effects differed between those unaware of the winery before visiting and those already aware. Visitors who bought more at the winery, bought less in the first three months, but then bought more in the following three months.

Executive Summary

Due to the complexity of this project and its multitude of findings, it is recommended that this final report be read in conjunction with the more detailed two interim research reports.

A cellar door is an expensive proposition and while millions of dollars have been invested in cellar door infrastructure, the impact of cellar door visitation has not been measured. This study provides strong evidence that the real value of a winery's investment in a cellar door is not only determined by how much wine it sells to wine tourist visitors; the cellar door is also a powerful catalyst that leads to change(s) in the way that a visitor consumes wine after the visit. Importantly, it can convert people who had never bought or experienced the winery's wines into buyers and/or consumers of the brand after the cellar door visit. It also has an effect on awareness and consumption of wines from the region.

During the first stage of the project 3,368 visitors in 6 states across 15 wine regions at 79 cellar doors, representing large, medium and small wineries in Australia participated in the project (also see the two previous reports: Bruwer, Lockshin, Saliba and Hirche, 2015; 2014a). The second stage followed a cohort of these cellar door visitors with two more surveys to determine the incidence and extent of changes in the consumption of wine in general and the repurchase of the identified brands in different retail channels during the subsequent six months (final sample size = 1,902).

Consumers who had not bought the winery's wine(s) before their visit to and purchase at the cellar door provide the clearest indication of conversion and purchasing in the retail sector that can be achieved post-visit. After the cellar door visit, 54% of this group bought wine from the winery they visited, purchasing 4.9 bottles on average within 6 months after the visit. The wines were mainly bought from large national liquor chain stores (33%), but a revisit to the cellar door (23%) also featured strongly. The cellar door channel, together with the other direct-to-consumer (DTC) channels (mailorder/wine club/online), collectively accounted for 31% of the purchases, thus sharply underlining their importance for wineries. For consumers who had not bought the wine before, the brand penetration metrics (the number who bought then or subsequently) ranged between 41-70% depending on the winery. The gain in terms of the visitors who had never bought the brand before or during the visit until the post-visit period is a solid 16% and can thus be directly ascribed to the cellar door visit and experience. For individual wine regions, the corresponding net gain figure varied between 9% (lowest) and 22% (highest). This result underlines how important the cellar door can be for a wine brand.

It was found that 67% of visitors bought wine during their cellar door visit. By the time 6 months had elapsed following the cellar door visit, 47% of the visitors had consumed all the wine they bought at the cellar door, most of it in their homes (68%). This also means that the brand remained in the immediate proximity of 53% of buyers, regardless of whether they bought it in the retail sector post-visit, or will be buying it in future.

There was a high level of repeat visits to the region (65%), which means that there is already familiarity with the wine regions. Forty-seven per cent of visitors had visited the region more than once in the past. The vast majority of the cellar door visitors were from Sydney, Melbourne, Adelaide, Perth and Brisbane, or their surrounds, and this correlated highly with repeat visits to the nearest wine regions. The final decision to visit a cellar door was made a very short time before the actual visit. An unplanned visit could be attributed to various aspects such as road signage and local recommendations, etc. It was found that many people are on holiday and wine tourism is an activity they engage in while in the area, but often it is not the primary reason for their visit.

Through this study, it was found that the cellar door visit was instrumental in provoking various changes in the consumers' wine consumption: higher quality, higher quantity, different grape varieties/wine types and higher prices were the most important. The strongest impact was that 47% increased their consumption of the visited region's wines.

The specific impacts on wine consumption after a visit to a cellar door were: 21% increased their overall wine consumption; 36% increased the quality (price point) of wine consumed; 47% of survey participants reported an increase in the quantity of wine consumed from the region; 26% changed the wine type/grape variety, adding a new grape variety or style that had not purchased before.

2. Background

Setting up, staffing and operating a cellar door is an expensive proposition. Despite the fact that so many Australian producers have invested millions of dollars in cellar door infrastructure and human capital at their wineries, the impact of cellar door visitation on wine consumption, relationship with the wine brand, etc. has not been measured.

More than 70% of Australian wineries crush less than 100 tons ($\pm 7,500$ cases produced) per year (Winetitles, 2014). The majority of these wineries sell the majority of their wine sales direct to their customers through the winery cellar door and/or its associated direct-to-consumer (DTC) channels. The cellar door is the sales channel where wineries have the most control, aside from the fact that, in most cases, it also yields the highest financial return on wine sold compared with other channels. It is also the main catchment area for an ongoing direct marketing opportunity to convert visitors into a more enduring relationship with the winery (Alant and Bruwer, 2010; Bruwer, 2002). For small and large wineries alike, the cellar door thus presents a unique opportunity to introduce consumers to marketing and other (sensory and environmental) stimuli that could become the drivers of changes in their wine consumption (i.e. choice of variety, region, etc) and of current and future purchasing of their brands in the off- and on-premise channels.

The cellar door is the pivotal entity within the triad of modes (cellar door, wine club, and direct online) that became known as the DTC channel. The use of the DTC channel is most closely interconnected with tourism activities as people have to select and travel to a wine

region which is often remotely located in order to visit cellar doors, in the process becoming wine tourists. A cellar door visit often is the starting point for the long-term relationship between consumer and wine product, winery and region (Bruwer, 2004, 2002). More specifically, we found that regular wine consumption is strongly associated with increased wine tourism activity (Bruwer and Lesschaeve, 2012a; Bruwer et al., 2012). This has profound implications in practice. It pinpoints that there is great potential for wine tourism to be better used by wineries as a DTC sales vehicle both during and after the visit. Wineries can also use the growing awareness and purchase of their wines as a driver of ongoing sales through the off- and on-trade retail sectors where 90% plus of all wine volume is sold in Australia (ABS, 2013). It makes sense for wineries to sell their wines in the nearest capital cities, since this is where many of their tourists originate.

This project goes beyond just measuring direct sales - it identifies the behavioural aspects and antecedents that impact current and future wine consumption behaviour.

Contracted by the Grape and Wine Research and Development Corporation (now the Australian Grape and Wine Authority) in January 2013, the project is one of the first opportunities to date (and by far the most in-depth) to measure core metrics of cellar door visitors across Australia and to track visitors' post-visit consumption changes and associated buying behaviour. It recruited visitors at cellar doors from a representative set of regions and wineries across Australia and measured their wine consumption behaviour and initial brand image of wineries and regions visited. It then followed consumers with two more surveys to measure the ongoing purchasing of wine in the subsequent six months. This project uses the techniques developed to measure loyalty (Bhattacharya, 1997) and those for brand/region awareness and recall (Driesener and Romaniuk 2006; Jarvis et al. 2006). The research was executed through a first-time formal collaboration between senior wine marketing researchers from two of Australia's leading 'wine universities' namely the University of South Australia (UniSA) and Charles Sturt University under the leadership of Professor Johan Bruwer of UniSA.

A project variation was submitted by AGWA and accepted by the University of South Australia to vary the project end date to 31 December 2014, to allow delivery of the final project outputs in 2014-15. This extended the initial project period by 6 months.

3. Project Aims and Performance Targets

All objectives are confined to the Australian domestic market.

The principal aim of this project is to:

Develop a better understanding of wine consumers' purchase and consumption patterns before, during and as a direct consequence of their visits to wineries, with the cellar door being the hub of their experience.

To answer this question, more specific objectives were pursued:

- Determine who the cellar door visitors are (socio-demographics), their wine consumption metrics, and relationship with the winery and region;
- Determine the nature and extent of the cellar door visitors' buying behaviour at the cellar door and the likelihood of them buying the brand in future;
- Explore the relationship that cellar door visitors have had with the winery's brand prior to visiting the cellar door;
- Uncover characteristics of the wine region as perceived by the cellar door visitors;
- Determine the effect of the cellar door visit on wine consumption in terms of regionality, type/style, and price/quality;
- Track the incidence and extent of purchase (and repurchase) of the wineries' wines after their visit at off-premise, on-premise and direct mode channels among a cohort of winery cellar door visitors; and
- Establish the nature of communication resulting from a cellar door visit, for example word-of-mouth, etc.

4. Method

This study forms part of a three-stage Cellar Door Visit Impact Tracking Research Project, to determine the impact of the visitor experience at the winery cellar door on current and future sales of the corporate wine brand. The study has a longitudinal and predominantly quantitative nature, utilising a combination of descriptive and quasi-experimental research designs, in the process employing various data collection techniques. It adopted a triangulation of research methods by using self-administered and online surveys in addition to secondary data to ensure reliable and valid information is collected.

As a basic premise, the study regards the phenomenon of determining how wineries can use their cellar doors as drivers to effect purchase-repurchase of their wine brands in the various distribution channels, as a common/uniform one throughout the industry. The wine regions where surveys were conducted are representative of the three awareness tiers of the Australian wine industry and of large, medium and small winery size groups.

A literature review was conducted to determine the current state of knowledge. Because very few peer-reviewed papers could be found, the trade (popular) press was included in the search. We found that the trade press had only reported on the behaviour of wine tourists from the perspective of what action(s) occurred (i.e. buying X bottles of wine) and who engaged in this behaviour (i.e. young 18-34 year old females). Moreover, we found no evidence of a study similar to ours in the public domain. This meant that methodology we adopted to execute this study had to developed from a baseline perspective.

The first stage of the project saw the survey of 3,368 visitors in 15 wine regions at 79 cellar doors, representing large, medium and small wineries across Australia (also see Bruwer, Lockshin, Saliba and Hirche, 2014a; 2014b). Follow-up surveys were then offered to this group with two more surveys, one at three months and one at six months to determine the incidence and extent of changes in the consumption of wine in general and repurchase of the identified brands in different retail channels to measure the ongoing purchasing of wine. The monitoring period of six months is deemed an appropriate minimum level to establish brand repurchase patterns of consumers of a product category such as wine.

Stage one (see first interim research report) consisted of a study executed at the cellar doors on visitors during an 8-10 week period starting mid-April and finishing in the first week of July 2013. The primary data collection instrument was a purpose-designed highly structured questionnaire. The final questionnaire had a total of 33 questions of which most were close-ended. The questionnaire was programmed for use on an iPad with a direct link to a web-research platform. Respondents had the choice of completing the survey on either paper or by using the iPad provided. Respondents answered questionnaires within an 8-12 minute time period on average. The amount of time needed to complete the questionnaire was explained to respondents and they were given an assurance of complete confidentiality regarding their personal information. Sample control factors that contributed to the quality

of the data collected, included that the majority of the respondents were regular wine drinkers, consuming wine at least once in the previous two months. Staff working at the cellar doors were individually trained/briefed and given clear written instructions on ensuring randomness when recruiting visitors to participate in the survey. For example, only one respondent from a household could participate in the survey. The project attempted to use iPads as an innovative data collection technique, however, the internet connection at many cellar doors was not fast enough. The interval for the data to be uploaded after each question was long and participants abandoned the survey. More printed surveys were made and distributed to the cellar doors. Some of the cellar doors with fast Internet continued to collect data this way.

Following the completion of the surveys the contact email addresses of all respondents were checked to ensure they were valid and could be used in the follow-up surveys - 3,107 respondents (95%) fitted these criteria. Any duplications (respondents who completed the survey more than once) were also removed. Finally, the data was analysed and manipulated using a statistical software package.

Due to the fact that three surveys were conducted during this project several months apart, this required that a check for consistency between the original sample collected at cellar doors and the final sample remaining after the two follow-up surveys be done. This 'check' revealed very high degrees of consistency. The results upon which the second interim report is based were therefore derived from a follow-up sample of cellar door visitors very similar to the original sample of cellar door visitors.

Stages two and three (referred to as 'Wave 1' and Wave 2' or the Follow-Up Surveys) were executed at 3-month intervals on the original cellar door visitors to determine the nature and extent of their continuing relationship with the brand. All visitors who completed the survey at a cellar door were contacted by email; the purpose of the two follow-up surveys was explained to them, and a request made for them to participate in the surveys. An incentive was offered to encourage participation. Follow-up requests were sent on two occasions to encourage participation. Only Australian permanent residents were included in the study, since it would have been difficult - if not impractical - to track brand purchases in a longitudinal study in several countries. Respondents were required to complete the

questionnaire through a seamless process by clicking on a direct link provided in the email to a web platform resulting in an online survey. Wave 1 of the follow-up surveys was administered to the cellar door visitors 3 months after their visit and Wave 2 administered 3 months later. The response rates were higher than expected: 49% for Wave 1 and 45% for Wave 2 (91% of Wave 1), resulting in a final retention rate of 57% and yielding a sufficient number of responses (n = 1,902) to achieve the study's objectives.

Following the completion of each survey period, the contact email addresses of all respondents were checked to ensure they were valid. Any duplications (respondents who completed the survey more than once) were also removed. Finally, the data was captured analysed and manipulated using a statistical software package and the interim reports on the findings prepared.

5. Results/Discussion

The male/female visitor ratio to the cellar doors of Australia is 45:55 (%). From an age generation viewpoint, visitors 35 years and older (61%) predominate. It was found that 39% are in the Millennial/Generation-Y age segment (18-34 years), 19% belong to the Generation-X segment (36-44 years) with the remaining 42% belonging to the Baby Boomer and Traditionalist segments (45 years and older).

There is a direct relationship between the finding that 91% of the cellar door visitors were from Sydney, Melbourne, Adelaide, Perth and Brisbane, or their surrounds, and that 65% of people were repeat visitors to the wine regions. Most visitors to cellar doors were urban residents visiting a nearby wine region. The high level of repeat visitation indicates a high level of familiarity with the wine regions among visitors with 47% having visited the region more than once in the past (average number of previous visits = 3.3 times). Whereas planning the trip to the wine region might happen well in advance, the final decision to visit a winery's cellar door was made a very short time beforehand, for example 79% decided within 1 week and a 59% within the 24-hour period before actually visiting. This could be testimony of impulsive (unplanned) cellar door visitation evoked by aspects such as road signage when driving past, recommendation from a nearby cellar door, etc.

The wine consumption habits of the cellar door visitors are of interest. They drink largely bottled wine (in standard size 750 ml bottles) at an average of 5.0 bottles of their household's total consumption of 9.5 bottles per month. Their individual consumption level is therefore considerably higher than the average for Australia which is 24.8 litres (± 33 bottles per year \approx 2.8 bottles per month) (ABS, 2013). This suggests that wine tourists are the higher volume wine consumers among the wine drinking population, which is in itself a significant finding.

One of the main reasons for operating a cellar door is to sell wine direct to the visiting public, usually at full margins which makes it a very attractive financial proposition for wineries. The research therefore measured buying and non-buying incidence, across product categories (wine, food, merchandise, etc) plus the volumetric and dollar values relating to the buying of wine. Cellar door visitors spent money on both non-wine and wine items. In total, 75% of visitors spent some money at the cellar doors. The average amount of money visitors spent was just over \$90. The visitors who bought wine (67% overall) took away around 4.4 bottles with them for later use. Wine club members are the premium customers of wineries as their buying metrics substantially exceed that of non-club members. These buying metrics of wine club members underline the fact that a winery needs a good strategy to attract visitors to the cellar door, recruit them into the wine club, and of course retain them for as long as possible. Retention of wine club members is an ongoing challenge in the sense that they remain members of a club only for about 24 months (2 years).

To uncover the characteristics of each of the wine regions as perceived by the cellar door visitors, the 'pick any' technique was used to determine the presence and frequency of a selection of 23 different regional characteristics. These represent the 'winescape' or so-called regional image. For the 15 wine regions examined across Australia the top 5 in terms of frequency of selection are: wines (87%); scenery, natural environment (78%); local food (58%); vineyard landscape (56%); and, atmosphere/climate/ambience of the area (49%). An array of other characteristics underpin these, varying from people factors (i.e. friendliness: 34%), to hygiene factors (i.e. cleanliness: 26%), to practical aspects that facilitate ease of moving around (i.e. signage: 18%). A comparative analysis of all 15 wine regions that depicts differences between individual regions can be seen in the first interim research report.

The true potential of wine tourism as the activity that brings people to the cellar door and thus in contact with the winery's brand is apparent in that 21% of visitors had not ever heard of the winery, meaning that they are completely unaware of the corporate brand. It is insightful that 64% of visitors had actually tried a wine of the winery before visiting the cellar door with that figure diluting somewhat to 58% who have actually purchased it in the past. Using a Juster scale to measure the likelihood of the visitors buying the brand of the winery visited during the period 3-6 months following the cellar door visit, showed a 41% likelihood of that happening.

It has long been one of industry's desires to find ways in which to influence and eventually change the consumption behaviour of Australian wine consumers. The main underlying premise of our research study is that a cellar door visit can change a visitor's behaviour, i.e. wine consumption habits, and more specifically translate into his/her buying of the brand post-visit. Our research measured this aspect and found that a visit to a wine region and some cellar doors within the region indeed has a changing effect. Six months after visiting a cellar door, 21% of visitors reported a change in both their overall wine consumption and 42% increased their consumption of the region-of-origin where the cellar door is located. The main consumption practices which changed was 36% increased the quality of wine consumed while 47% reported an increase in the quantity of wine consumed from the region. Other notable changes were that 26% added a new wine type/grape variety (26%) to their overall consumption, and a 25% increased the quality of region-of-origin wines consumed.

Cellar door visitors are known to seek information about the region and its wineries before and during a visit (Alant and Bruwer, 2010) for a variety of reasons. However, there has been little research to determine the nature, extent and direction of their communication following such a visit. Our study found that 83% of cellar door visitors had recommended a wine of the visited winery to someone else within the six-month post-visit period. Also, that this had occurred on 3.4 separate occasions to 2.4 reference groups. Friends (43%) were the most frequented reference group, followed by family (29%) and work colleagues (23%). This underlines the fact that the cellar door visitors assume a brand ambassadorial role, which holds future benefits for winery owners. By 'digging' deeper into how this communication occurred, it was found that the somewhat 'traditional' face-to face conversation represented

an astounding 65% of all communications. The electronic media (excluding telephone conversation) collectively accounted for 'only' 19% of communications. The social media at 7% clearly has a long way to progress before reaching the much vaunted heights predicted for them.

The main underlying premise of our research study is that a cellar door visit can change a visitor's behaviour, i.e. wine consumption habits, and more specifically translate into his/her buying of the brand post-visit. We found that 54% of cellar door visitors purchased and/or repurchased the wine brand during the six-month period post-visit and that this amounted to just over 9 bottles (4.9 bottles if non-buyers are included). It is also clear that a high level of brand awareness (79%) already existed prior to the visit. This raised the inevitable question whether these results were not simply reflective of people already buying the brand before visiting and continuing to do that post-visit. Although several permutations are possible, we contend that the most realistic measure of the influence of a cellar door visit on sales of the brand is to focus only on people who had never bought the brand prior to the visit. Firstly, 39% of visitors had not bought the brand until the time of their cellar door visit. Six months on, 41% of these have bought the brand either again or for the first time which equates to a net gain of 16% of visitors who bought 2.4 bottles of wine on average. Quantification of these metrics on a national, regional and individual winery basis will illuminate the actual value of cellar doors post-visit in monetary terms.

6. Outcome/Conclusion

The cellar door is a powerful catalyst to invoke various change(s) in the wine consumption of consumers. The challenge lies in how to use the cellar door to the maximum of its potential as a 'change agent' to cause these changes to occur. However, the first priority should always be the building of a strong relationship between consumer (cellar door visitor) and the wine brand. People visiting a cellar door become more educated about the wine region, its wineries, wines and people and this increases the consumption of wines of that origin. Should these changes prove to be permanent in nature, industry would benefit profoundly from selling more wine of higher quality at higher prices. Follow-up research in this regard is needed.

This research study has shown that the wineries have most of the factors in place as far as their wine tourism offering is concerned in order to remain important wine tourism destinations. At the same time it also underlined that the wineries still have some work to do to optimize all of these further. To optimise the direct-to-consumer (DTC) marketing opportunity, a winery needs a cellar door that informs visitors about the wine products and familiarise them with the brand. This is only possible if the region (and the winery) can attract the 'right' number of wine tourists to the winery and its cellar door.

7. Recommendations

This project is one of the first opportunities to date (and by far the most in-depth) to measure core metrics of cellar door visitors across Australia and to track these visitors' post-visit consumption changes and associated buying behaviour.

In the current market, with retail consolidation manifesting more and more, competition for shelf space increasing, and the total number of wineries increasing, selling more wine through the cellar door may allow wineries to lower marketing costs and increase revenue. The proliferation of wine groups/clubs, commonly generated from sign-ups at cellar doors, has found only limited success. Marketing 'push' activities of this kind will continue to under deliver until a better understanding of consumer preferences has been developed and can deliver offers that are desired by the end user. Further research probing the wine club scenario in particular, is essential.

This project uncovered some promising results by looking at domestic wine tourism only and it is recommended that this be extended to include international tourism.

Professionalism in the wine industry translates to increased competitiveness and ultimately in wine business success. It is therefore absolutely vital that scientific research studies yielding valid and reliable information such as this one be executed at regular intervals in future in order to establish benchmarks and monitor progress towards set strategic goals.

This foundational study highlighted the pressing need for further research in this field.

8. Appendix 1: Communication

All the findings of the study are detailed in two interim research reports and short video clips which are accessible from the website of the Australian Grape and Wine Authority (AGWA):

<http://www.gwrdc.com.au/wp-content/uploads/2014/03/Interim-Research-Report-GWRDC-USA-1204-Stage-1-Cellar-Door-20131.pdf>

<http://www.gwrdc.com.au/wp-content/uploads/2014/03/Interim-Research-Report-GWRDC-USA-1204-Stage-2-Cellar-Door-20142.pdf>

9. Appendix 2: Intellectual Property (IP)

As per the variation agreement dated 26 March 2014, the project IP shares reflect the involvement of the three parties as follows:

Australian Grape and Wine Authority (AGWA)	56%
University of South Australia (UniSA)	33%
Charles Sturt University (CSU)	11%

10. Appendix 3: References

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11. Appendix 4: Staff

Name	Role	Organisation
Professor Johan Bruwer	Principal Investigator	UniSA ¹ - School of Marketing
Professor Larry Lockshin	Co-Investigator	UniSA ¹ - School of Marketing
Professor Anthony Saliba	Co-Investigator	CSU ² - School of Psychology
Martin Hirche	Research Associate	UniSA ¹ - School of Marketing

¹ University of South Australia

² Charles Sturt University

12. Appendix 6: Budget Reconciliation

See AGWA's Clarity online system.