
Beyond the traditional cellar door: Do tiered cellar door service offerings maximise value for different wine tourist segments?



FINAL REPORT FOR INCUBATOR PROJECT

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Glossary of Abbreviations

Abbreviation	Term
DTC	Direct-to-Consumer
POS	Point-of-Sale
HM WE	High motivation for wine experience (taste/buy wines)
LMM WE	Low-moderate motivation for wine experience (taste/buy wines)
LM WE	Low motivation for wine experience (taste/buy wines)
HInv	High wine product involvement
MInv	Moderate wine product involvement
LInv	Low wine product involvement
% of V	Percentage of visitors that entered the service offering zone
Trans	Transactions (total)
CV%	Conversion Rate % (total transactions / visitors)
ATV	Average transaction value
AVV	Average visitor value
IPS	Items per sale
RV	Return visitor (tracked up to 30 days previous visit)
RV%	Return visitor % (return visitor / visitors)

1. Abstract

This Incubator Initiative focuses on developing a better understanding of the different consumer segments that visit wineries and what service offering mix (e.g. wine tasting, restaurant, gift shop, gallery/museum, etc...) represents an appropriate value proposition for them.

Using a combination of intercept surveys, visitor tracking analytics and POS data at two research sites in Western Australia the study identified four wine tourist segments and profiled their underlying wine consumption habits, visitation motivations and onsite spending behaviour. This ultimately identifies their financial value to a wine producer and answers the research question:

Do tiered cellar door service offerings maximise value for differing wine tourist segments? Yes.

2. Executive Summary

Two key segmentation bases were used in identifying the segments: 1) wine product involvement (i.e. how important wine is to them and how invested they are in the product), and; 2) motivation to visit the winery (i.e. motivated to taste and buy wine versus motivated to socialise with friends/family). Based on these segmentation bases, four wine tourist segments were identified:

1. Highly motivated to taste/buy wines – High wine product involvement (42.9%)
2. Low-moderate motivation to taste/buy wines – High wine product involvement (24.1%)
3. Low motivation to taste/buy wines – Moderate wine product involvement (23.5%)
4. Low motivation to taste buy wines – Low wine product involvement (9.7%)

Detailed profiles and strategies for each segment are outlined within the report. Key insights/recommendations include:

1. Less than 50% of winery visitors are motivated to taste and buy wines. Conversely, every segment is highly motivated to socialise with friends/family. Therefore, wine producers must view visitors as wine tourists rather than traditional wine consumers.
2. All segments have similar average spend amounts (lowest \$113.94 - highest \$132.28). As such, there is no specific segment that can be classified as a 'high value' segment.
3. Expanding the service offering mix to including food options reduces the reliance on the cellar door to drive wine sales through takeaway wine only. Further, it increases DTC sales, keeps visitors onsite longer creating a vibrant atmosphere and leads to greater repeat visitation.
4. Gift shops offer limited value. Conversion rates on visitors entering the gift shop at both sites were 1.96% and 3.63% respectively, representing very low conversion rates. Wine producers should consider repurposing these spaces.
5. Wine producers should charge for wine tasting. It qualifies 'wine consumers' amongst overall 'wine tourist' visitors, manages capacity, allows staff to provide individual service and increases sales conversions whilst having no negative impact on visitors attitude towards the winery.

3. Aims and Background

Studies suggest that the majority of wine producers in Australia are struggling with profitability (Kansil and Roberts 2013; Poddar 2015). While the application of science and technology are important factors to lift profitability, so too are sound business practices. For example, business practices such as direct-to-consumer (DTC) channels, including cellar door activities, have been crucial for market access and profitability (Bruwer et al. 2014).

Previous research suggests that to succeed wine producers need to attract the 'right' high-value consumers (Bruwer et al. 2014) and create an augmented experience beyond simple wine tasting through the inclusion of complementary service offerings (Quintal et al. 2015). While some wine producers are augmenting their experience through offerings such as restaurants, local produce, galleries and museums, empirical evidence and understanding of the effectiveness of each of these

offerings in attracting the ‘right’ high-value consumers—and what financial yield they deliver—is lacking.

Using a value proposition canvassing perspective applied to a wine tourism context, as seen in Appendix A, provides a framework to conceptualise how a winery could develop a tiered range of value propositions that utilise a variety of service offerings to meet different segment’s needs. From that conceptualisation, the following research question is presented:

- Do tiered cellar door service offerings maximise value for differing wine tourist segments?

Our project aims to address the research gap and answer this question by collaborating with two WA wine producers that have a diverse set of service offerings. Using a combination of intercept surveys, visitor tracking analytics and POS data this study will develop a specific set of wine tourist segment profiles and examine what service offering mix they are seeking as a value proposition when visiting a winery as well as investigate the financial value of each segment to a wine producer.

4. Materials and Methods

This study employed a mixture of quantitative and ethnographic methods, namely, intercept surveys of winery visitors and a combination of visitor tracking analytics as well as POS data. As will be outlined below, these techniques were used in four stages to develop wine tourist segment profiles and examine their onsite behaviour and spending choices at two WA winery research sites.

Research sites

The two winery locations were selected due to the diversity of their onsite service offering mix in addition to offering perspectives from two different wine regions. Both wineries have made significant investment in their wine tourism offering, so it is the researcher’s opinion that insights from such producers could provide a useful roadmap for smaller wineries aiming to expand their own offering.

Winery A is located in the Margaret River region and has an annual production of approximately 100 tonnes, which is sold almost exclusively DTC onsite and online. In regards to quality, they have a 5 star James Halliday rating, which provides some evidence that they are a premium producer. They have an elaborate facility that includes service offerings: 1) a wine tasting bar; 2) gift shop; 3) gallery/museum; 4) fine dining restaurant; 5) casual dining in the form of wood-fired pizzas; 6) a brewery taphouse (launched during study, so not integrated into analytics framework for the study); 7) live entertainment on selected days; 8) a large children’s playground, and; 9) ballroom, which is used for conferences and weddings. All which is situated in manicured grounds with vineyard views. Over the course of 15 months that visitor numbers were tracked they attracted approximately 198,363 visitors.

Winery B is located in the Swan Valley and has an annual production of approximately 200 tonnes, which is sold through a mix of channels including DTC onsite and online as well as through wholesale distributors and national retailers. In regards to quality, they have a 5 red star James Halliday rating, which provides some evidence that they are a premium producer. The wine tourism facility includes service offerings: 1) wine tasting bar; 2) special tasting room; 3) gift shop, within primary tasting room, and; 4) fine dining restaurant. Further, there is an onsite wedding gable and the venue is a popular wedding destination. Over the course of 17 months that visitor numbers were tracked they attracted approximately 80,151 visitors.

Instrumentation, Sampling and Analysis

Stage One (analytics data collection) began with installation of mobile phone tracking sensors into the two partner wine producers’ cellar door facilities and capturing tracking data (see Appendix B for an example layout). The tracking technology works by creating a virtual fence around a desired zone and registers anyone with a smartphone that crosses over the fence as a visitor. Once registered within a zone, data on whether they are a first-time visitor or repeat visitor, their dwell time within the zone is collected. No personal identifying information is collected. Using multiple sensors, zones can be created within specific service area zones (i.e. restaurant, wine tasting bar, gift shop and gallery) to

track the number of visitors to engaging with each specific service offering as a subset of visitors to the entire facility.

The tracking data is then cross-referenced with POS data to determine sales conversion rates (SC%); average transaction value (ATV); average visitor value (AVV) and; items per sale (IPS) across multiple defined service offerings/product categories (see Appendix C for graphical representation of this). For example, to determine the SC%, ATV, AVV and IPS on takeaway wine sales a virtual fence is created around the wine tasting area to determine the number of visitors coming to taste and buy wine as a subset of overall visitors to the entire facility. Then takeaway wine specific POS items are isolated and cross-referenced with the visitors within the wine tasting zone to determine the SC%, ATV and IPS on takeaway wine.

Winery A had five tracking sensors installed within the facility (wine tasting, gift shop, gallery/museum, wine bar/casual dining and fine dining restaurant) between December 2019 and March 2021 providing 15 months of data. Three tracking sensors were installed at Winery A (wine tasting cellar door/gift shop, special tasting area and fine dining restaurant) from October 2019 to March 2021 providing 17 months of data.

Stage Two (survey data collection) involved the use of intercept surveys to collect data to facilitate the segmentation and profiling of the winery visitors as well as provide data points to aid in the triangulation to the analytics data. The survey instrument was developed in line with established wine consumer segmentation measures (Alant and Bruwer, 2010; Bruwer et al. 2017; Galloway et al. 2008; Laurent and Kapferer, 1985). It included 90 items across three categories: 1) visitation data; 2) wine consumption behaviours, and; 3) demographics. Scale types included nominal, ordinal and scale items. Scale items were measured on a 7-point Likert scale (1 = strongly disagree, 7 = strongly agree).

Survey data was collected using a convenience sampling method *in situ* at the wineries. Respondents were intercepted as they were exiting the facility as not to interfere with their visitation experience and allow them to reflect accurately on their experience while it is still front of mind. A total of 347 responses were collected across both wineries between September 2020 and February 2021. 28 responses were excluded due to missing data, leaving 319 usable responses.

Stage Three (wine tourist profiling and analytics triangulation) required identification and validation of distinct wine tourist segments using a cluster analysis technique. Once the segments were identified, profiles were developed using a range of visitation, wine consumption behaviour and demographic variables. Finally, profiles were triangulated with the analytics data using a range of variables, including: 1) time of visit; 2) length of visit; 3) service offerings interacted with; 4) total amount spent during visit, and; 5) amount spent within each service offering zone (measured using zero-sum variable).

Stage Four (A:B testing experiments) is an addition to this report beyond the scope of the initial proposal, but has been included to showcase the capabilities of embedding visitor analytics with a winery business model. In this study, A:B testing was used to examine the impact of implementing a tasting fee at Winery A. Winery A began charging a \$6 non-refundable tasting fee at their wine tasting bar on February 6 2020, which remained in place for the duration of the study. Previously, they had only charged this fee when facilitating large tour groups. Analytics data was examined pre and post February 6 to assess the impact on CV%, ATV, AVV and IPS. Further, items with the intercept survey collected data relating to attitude towards the winery, attitude towards the tasting fee and willingness to recommend (net promoter score). This allowed for examination of the impact of the tasting fee on sales conversions as well as at an attitudinal level.

5. Results and Discussion

The results section is structured into four parts. First, the approach and identification of four key wine tourist segments is discussed, along with key initial insights. Second, each of the four segments are

profiled and some initial insights discussed. Third, findings from the analytics data will be discussed. Finally, the findings from the implementation of a wine tasting fee experiment and its positive impact will be discussed.

Segmentation of the sample followed a data-driven procedure outlined by Dolcinar (2008) in which cluster segments were created from relevant segmentation bases. Two key segmentation bases were used: 1) wine product involvement (i.e. how important wine is to them; how much pleasure does it deliver, and; how central is it to their identity), and; 2) motivation to visit the winery (i.e. motivated to taste and buy wine versus motivated to socialise with friends/family). At a conceptual level, product involvement references an enduring/ongoing attitude towards wine and motivation to visit references a situational reason on why the visitor has chosen to visit the winery.

Based on these segmentation bases, four wine tourist segments were identified:

1. Highly motivated to taste/buy wines – High wine product involvement (42.9%)
2. Low-moderate motivation to taste/buy wines – High wine product involvement (24.1%)
3. Low motivation to taste/buy wines – Moderate wine product involvement (23.5%)
4. Low motivation to taste buy wines – Low wine product involvement (9.7%)

Appendix D provides an overview of how each segment scores across each of their segmentation bases. Whilst significant differences were displayed across the segmentation bases, a further 27 items relating to wine consumption behaviour, visitation behaviour and spending as well as demographics also displayed significant differences across the segments. Appendix E provides a statistical breakdown of each segment and highlights differences between them based on each of these 27 items.

Before providing a detailed profile on each segment, two overarching key insights need to be discussed. First, less than 50% of winery visitors are motivated to taste and buy wines. Conversely, every segment is highly motivated to socialise with friends/family. Therefore, wine producers must view visitors as wine tourists rather than traditional wine consumers and focus on delivering unique experiences that make that facilitate socialisation. Something that may be counter intuitive to some wine producers.

Second, all segments have similar average spend amounts (lowest \$113.94 - highest \$132.28). They just focus their spending on different service offerings/product categories. Segment 1 is more focused on takeaway wine, whilst the other segments are more focused on food offerings. As such, there is no specific segment that can be classified as a 'high value' segment.

Segment 1: High Wine Experience Motivation | High Wine Involvement (42.9%)

This segment has a high motivation to taste and buy wines coupled with high levels of involvement with wine across all involvement variables, with exception of symbolic value which is moderate. Of the four segments, they are the most likely to be a Millennial (43.4%), a first-time visitor to the winery (50.7%) as well as a member of an organised tour group (81.8% of tour group participants fell into this segment). Along with Segment 2 (both high in wine involvement), they are more likely to drink multiple bottles of wine per week and spend upwards of \$20 on a bottle. Lastly, they predominately female (60.3%), although this is in line with the gender distribution for total sample.

This suggests that generally, this segment whilst highly involved with wine is at the early stages of their wine journey and are visiting wineries to expand their knowledge of wines and wine producers. Wine isn't yet central to their identity so they don't view themselves as wine connoisseurs, but nonetheless they are keen to learn through experience and are willing to purchase wines to do so.

When visiting a winery, they are most likely to spend the shortest time onsite (76.85 minutes) and have an average spend of \$128.24. This is most commonly spent on takeaway wine with 57.8% buying takeaway wine and 39.3% making it 100% of their purchase onsite. Food options are still attractive to some within the segment with 25.2% (14.1% making it their total purchase) spending on fine dining and 29.2% (10.8% total purchase) on casual dining. However, tasting and buying wines is the clear focus of this segment.

Segment 2: Low-Moderate Wine Experience Motivation | High Wine Involvement (24.1%)

Segment 2 is characterised by having high levels of involvement with wine across all involvement factors, including symbolic value, which suggests they would view themselves as wine connoisseurs and are experienced wine drinkers. Like Segment 1, they are more likely to drink multiple bottles of wine per week and spend upwards of \$20 on a bottle.

They have low to moderate motivation to taste and buy wine, which means that they are currently visiting the winery to socialise with friends and family whilst enjoying a meal. However, this is not a blanket rule and some members of this segment will be motivated to taste and buy wines. These points are supported by there being a clear preference to engage with food related service offerings with 42.1% (25% total purchase) spending on fine dining and 53.1% (34.7% total purchase) on casual dining. Only 9.2% of the segment made their entire purchase on takeaway wine, however 30.3% made some form of takeaway wine purchase. This suggests that whilst primarily motivated for food offerings, this segment is also willing to make a small takeaway wine purchase before leaving as well. They have an average spend of \$132.28 and an average length of visit of 106.84 minutes. Lastly, they predominately female (62.3%), although this is in line with the gender distribution for total sample.

Additionally, members of Segment 2 are most likely repeat visitors (64.9%). Taking this into account along with the similarities in their involvement profiles, there is some indication that Segment 2 is a more evolved version of segment 1 and has progressed further along their wine journey as wine more central to their identity. One theory around this is that they may have previously visited the winery, enjoyed their wine offering and now that they have an experienced perspective they like what they saw and are willing to become a repeat visitor. This is aided by having a food offerings to attract them back. An alternate theory is that member of Segment 2 could easily also be a member of Segment 1 for a different winery in the same day. Due to the cross-sectional nature of the data, they have just may have happened to be surveyed at a winery they decided to make their lunch stop for the day. Therefore, replicating this study and incorporating questions related to visitation to other wineries within the wine region as well as at wineries that do not have food offerings would help answer that question.

Regardless, both Segment 1 and 2 represent strong candidates for wine club membership as they have highest levels of wine consumption and spending and represent 'high value' takeaway wine consumers. Integrating a food offering into the total cellar door service offering will help attract repeat visitation within these wine experienced and quality driven segments.

Segment 3: Low Wine Experience Motivation | Moderate Wine Involvement (23.5%)

Segment 3 has the lowest level of motivation to taste and buy wines of all segments, which is typified by only 8.3% of the segment buying takeaway wine and 0% making it their total purchase. In regards to their wine involvement, they score a moderate level for product importance and symbolic value but high for hedonic value. This suggests that they are not concerned with the provenance of wine and do not associate wine with their personal identity. Rather, wine is the social lubricant when catching up with friends and family over a meal. This is reinforced by the segment's high motivation

to socialise with friends coupled with their almost exclusive interacting with food offerings such fine dining (34.7% of the segment spending here, with 30.6% making it their entire purchase) and more specifically, casual dining (64.7%) and 47.8% making it their entire purchase. Further, they are most likely to be repeat visitors (58.7%), female (60%) and will spend on average 103.91 minutes onsite. As a wine consumer, they drink less frequently than Segments 1 and 2 with a slight majority of the segment drinking less than a bottle a week and they are more likely to purchase bottles under \$20.

Whilst this segment could be considered a 'low value' consumer of takeaway wine, which is a winery's core business, they still spend an equivalent amount onsite as Segments 1 and 2 with an average spend of \$113.94. Rather than takeaway wine, it is spent on food offerings, which will also include bottles of entry-level wine served with the food.

As this segment represents 23.5% of all wine tourists, wineries that invest in offering food options, especially casual dining such as wood-fired pizzas that will have a competitive advantage over wineries that do not as they vastly widen their potential market. Data from the study supports this with Winery A attracting higher proportions of Segment 3 and 2 than Winery B, which does not have a casual dining service offering. Additionally, food items such as wood-fired pizzas are a perfect example of a high gross profit that can be delivered with less staffing requirements through counter service and self-service buzzers notifying the customer that their order is ready to collect. With staffing a major issue regionally in hospitality this is a great solution to service high volumes of customers in a profitable manner.

Segment 4: Low Wine Experience Motivation | Low Wine Involvement (9.7%)

This segment is the smallest of all segments representing 9.7% of the sample. They have low motivation to taste and buy wine and also have very low involvement with wine. They are most likely a tag-along within a group with other segments. The fact that they are counter to the other three segments and predominately male (54.8%) and that the majority of visitors come with their spouse/partner helps support this view.

Whilst they are tag-alongs they still represent significant value to wineries that have invested in food offerings as the majority of their \$128.26 average spend is focused on either fine dining (30%, with 23.3% making it their total purchase) or casual dining (44.4%, with 33.3% making it their total purchase). There is also a small proportion that will purchase takeaway wine (13.3%). However, wine producers targeting this segment should ensure that they have beverage options other than wine available with meals to satisfy them.

Analytics Data Insights

A summary of the visitor tracking analytics data for both research sites over the length of the study can be seen in Figure 1. April and May were removed from the summary as they were heavily affected by COVID-19 related lockdowns. A timeline of the COVID-19 impact on both sites ability to open can be seen in Appendix F. The COVID-19 pandemic caused some havoc for wine producers with lockdowns and visitor restrictions, but also made them think innovatively in regards to how they utilised their wine tourism facilities amidst those restrictions. This has provided a wealth of opportunities to investigate the impact of these changes through the analytics data (e.g. SC% and ATV of sit down vs traditional standing wine tasting). However, these experiments are outside the scope of the current report and will need to be discussed during the extension activities.

Within this report, four key insights from the analytics will be discussed. Firstly, expanding service offerings attracts more total visitors but reduces the percentage of people tasting wines through the

cellar door. Winery A attracted 198,363 over the course of the study, which is more than double Winery B. However, only 14.03% of visitors engaging with the wine tasting area compared to 23.05% at Winery B. Referencing Table D1, It can be seen that Winery B attracts a higher proportion of Segment 1 (motivated to taste/buy wines) and Winery A attracts a higher proportion of Segments 2 and 3 (not motivated to taste/buy wines). Reducing the proportion of Segment 1 visiting the winery could be seen as a negative as it takes away visitors that drive the core business of a winery. However, having multiple dining options will facilitate wine sales onsite whilst keeping people onsite longer and help create a vibrant atmosphere. Ultimately, it increases DTC sales and reduces the need to work with distributors whilst delivering higher margins on wines produced. Winery A produces half the amount of wine of Winery B, but almost exclusively sells everything DTC.

Figure 1: Study-long high-level analytics insights

Winery A

Dec 19 - Mar 21	Location	Inside	% of V	Trans	SC %	ATV	AVV	IPS	RV (30)	RV %
Apr-May removed COVID Lockdown	On Site Total	198,363		47,598	24.00%	89.36	21.44	4.83	1,913	0.96%
	Zones									
	Gift Shop/Homewares	46,603	23.49%	915	1.96%	108.31	2.13	1.70	1,016	2.18%
	Fine Dining Restaurant	17,182	8.66%	5,249	30.55%	295.33	90.22	16.28	1,871	10.89%
	Gallery/Museum	65,231	32.88%	NA	NA	NA	NA	NA	1,399	2.14%
	Casual Dining	94,494	47.64%	22,563	23.88%	43.95	10.49	2.75	2,406	2.55%
	Wine Tasting (Tasting Fee)	27,835	14.03%	5,494	19.74%	4.60	0.91	2.05	1,033	3.71%
	Wine Tasting (Wine Sales)	27,835	14.03%	9,492	34.10%	106.97	36.48	3.36	1,033	3.71%

Winery B

Oct 19 - Mar 21	Location	Inside	% of V	Trans	SC %	ATV	AVV	IPS	RV (30)	RV %
Apr-May removed COVID Lockdown	On Site Total	80,151		28,527	35.59%	109.68	39.04	7.77	737	0.92%
	Zones									
	Special Tasting Area*	15,309	19.10%	1,350	8.82%	76.67	6.76	5.83	634	4.14%
	Cellar Door (Wine Sales)	18,471	23.05%	7,641	41.37%	86.33	35.71	3.72	723	3.91%
	Giftshop	7,053	23.05%**	256	3.63%	39.90	1.45	1.16	465	6.59%
	Fine Dining Restaurant	43,310	54.04%	19,280	44.52%	122.17	54.39	9.60	979	2.26%

* Special tasting zone sometimes used as restaurant overflow. Useful insights at specific day-level

** Giftshop data: July 2020 - Mar 2021

Secondly, casual dining is a great option for extracting value from the non-taste/buy wine segments. Winery A attracts a high volume of these visitors, making up 47.64% of visitors and 47.4% of transactions. Casual dining (i.e. wood-fired pizzas with self-service buzzers plus non-wine beverage options) have high gross profit margins reducing the drain on staffing resources and also provides a dining option that does not require visitors to book in advance. Post-COVID, domestic travel to Margaret River has been high and wineries with fine dining restaurants are most commonly booked out in advance. This casual dining format is often the last dining option for those who cannot get a booking elsewhere widening the scope of potential visitors. As highlighted earlier, it is also a necessary offering to attract Segment 3, which represents a sizeable 23.5% of the market

Third, gift shops offer limited value. Conversion rates on visitors entering the gift shop at both sites were 1.96% and 3.63% respectively, representing very low conversion rates. Further, gift shops are stocked with non-winery branded products that have low gross profit margins. As will be discussed in the recommendations, wine producers should consider repurposing these spaces.

Finally, an A:B testing experiment that was conducted during the study to examine the impact of introducing a tasting fee. As seen in Figure 2, analytics data pre and post this adoption were used to assess the impact of this. Raw data suggests that introducing a tasting fee has no impact on improving

wines sales (ATV, AVV, IPS and SC%). However, when adjusting the total number of visitors that pay for a wine tasting a more accurate picture is painted (highlighted in red). SC% increases from 39.32% to 71.31%, ATV increase slightly and IPS decreases. The increase in SC% is a big win for Winery A, but there are other positive flow on effects including: 1) recouping the costs of tasting stock; 2) it qualifies wine consumers (Segment 1) amongst wine tourists (other segments) and; 3) allows tasting staff to focus on the interested party and deliver a more intimate tasting experience without needing to run from one group to another. This is especially good when the tasting area is within the same space as other service offerings and prone to thoroughfare traffic. Further, using statistical analysis of data from the intercept surveys it was found that whilst most visitors had a negative attitude towards being charged a tasting fee, this had no impact on their attitude towards the winery or willingness to recommend the winery to others. This provides strong evidence that charging for wine tastings drastically improves conversion rates and has no negative impact on visitors' attitude towards the winery. A win-win situation.

Figure 1: Analytics insights Pre and Post Implementation of a Tasting Fee

Pre-Fee	Location	Inside	Trans	SC %	ATV	AVV	IPS	RV (30)	RV %
	Wine Tasting (Tasting Fee)	4,537	41	0.90%	113.73	1.03	11.54	42	0.93%
	Wine Tasting (Wine Sales)	4,537	1,784	39.32%	104.18	40.97	3.83	42	0.93%

Post-Fee	Location	Inside	Trans	SC %	ATV	AVV	IPS	RV (30)	RV %
	Wine Tasting (Tasting Fee)	21,735	5,453	25.09%	3.67	0.92	1.98	991	4.56%
	Wine Tasting (Wine Sales)	21,735	7,708	35.46%	104.42	37.03	3.25	991	4.56%
	Wine Sales (Adjusted)	10,809	7,708	71.31%	104.42	74.46			

6. Conclusion and Recommendations

Based on the findings, the following recommendations are made:

Recommendation #1: Wine producers must view visitors as wine tourists, not wine consumers, and develop multi-pronged wine experiences as value propositions for individual wine tourist segments

As highlighted, less than 50% of winery visitors are motivated to taste and buy wines. Conversely, all visitors are highly motivated to socialise with friends/family. This makes sense as most wineries are located within greater tourism regions and visiting a winery for hospitality purposes would most likely be on the itinerary for any tourist within these regions. Not all of them would be classified as a wine consumer in the purest sense, but still offer financial value to a winery if the service offering mix is geared correctly.

Therefore, wine producers must view visitors as wine tourists first and foremost rather than traditional wine consumers and focus on delivering unique experiences that make the core wine product central in the experience, facilitates socialisation whilst not alienating the tag-alongs (Segment 4) within a group, who have an average spend of \$128.26 if served correctly.

Recommendation #2: Integrate food into service offering mix

Findings show that providing food options will attract a higher volume of visitors to the winery as it is a key attraction for three of the four identified segments and is also sought after by the more wine-focused Segment 1. All segments are motivated to visit a winery to fulfil the desire to socialise with friends and family. Food options are the perfect mechanism for this as it gets visitors sitting down and relaxing into the venue and keeps them onsite longer, which creates a more vibrant and social atmosphere. It also provides another avenue to sell wine DTC and lead to greater repeat visitation behaviour as well. As shown with Winery A, providing multiple food offerings attracts a broad range of visitors at high volumes and helps them push towards a 100% DTC sales model.

Wine producers that only offer wine tasting at their cellar door could take the initial step towards integrating food into the service offering by selling charcuterie boards with cured meats, cheeses and condiments. These are easy to prepare and have a relatively good shelf life. They are also common fare when drinking wine and visitors should be receptive. Whilst this might not be a unique food offering, the main goal of providing this service is to get visitors sitting down, buying wine for onsite consumption and socialising with friends.

Wine producers that are looking to accommodate high volumes of traffic should explore casual dining options such as wood-fired pizzas. They are relatively easy to produce and have reduced staffing requirements as opposed to an ala carte menu, they have a broad appeal and deliver high gross profit margins.

Recommendation #3: Gift shops have limited value and repurposing their spaces should be considered

The analytics data shows that conversion rates on visitors entering the gift shop at both sites were 1.96% and 3.63% respectively, which is very low. Further gift shops are stocked with non-winery branded products that have low gross profit margins. It is recommended that gift shop floor space should be dedicated to creating unique wine tasting or food offering experiences. If a producer insists on utilising a gift shop, they should focus on branded products such as apparel.

Recommendation #4: Wine producers should charge for wine tastings

As highlighted, implementing a tasting fee increased sales conversions whilst not negatively impacting the attitude towards the winery or willingness to recommend the winery, which is noted as a common fear of producers reluctant to undertake such a strategy. Beyond the positive of lifting sales conversions, it helps recoup costs of tasting stock and also helps staff qualify 'wine consumers' who are serious about tasting and buying wines, allowing them to provide more personalised service.

The winery within this study applied a non-refundable \$6 tasting fee. However, there are other possible iterations of how a tasting could be implemented, so further research investigating the impact of these different variations should be conducted. Nonetheless, from this study alone, implementing a tasting fee appears to be a no brainer for producers.

Recommendation #5: Wine producers should invest in analytics as a business intelligence system

Customer profiling and analytics data provides intelligence on the performance of certain product categories and service offerings by providing data on sales conversion rates, average transaction value, average visitor value, items per sale and repeat visitation. This allows wine producers to accurately understand what customer segments they are attracting, monitor performance and set more accurate benchmarks, the ability to run A:B testing experiments when optimising the cellar door experience and monitor staff performance.

Google Analytics has revolutionised how businesses approach marketing in the 21st Century (Plaza 2011). Applying this ethos from the digital world to the physical will provide intelligence to ensure they are extracting the maximum value from their most important sales channel. This study is the tip of the iceberg of the capabilities that analytics and artificial intelligence will deliver in the business world over the next few decades. Producers that get in on the ground floor will reap the benefits.

Recommendation #6: Consideration should be given to applying visitor profiling and analytics methodology at a regional level... and extend beyond the wine industry

Placing a tracking sensor and deploying the same visitor profiling and analytics methodology at every winery within a region would offer a wealth of intelligence gathering opportunities and applications. For example, the development of a benchmarking tool for wine producers. Wine producers would need to be segmented into relevant categories (i.e. diversity of tourism facilities offered or

geographical location) to keep site- specific data anonymous. For instance, categorising wineries based on their service offerings (i.e. cellar door tasting only; cellar door tasting + restaurant; etc...) would this provide useful data to individual wine producers on how they are performing compared to their peers. This data would also be very useful for overarching associations wine associations to monitor regional visitation and site performance, which could assist with development of support programs.

Additionally, using visitation and repeat visitation functionality, the impact of regional events could be more accurately assessed. For instance, Margaret River holds its annual Gourmet Escape in November. Isolating visitors from that weekend and then tracking their repeat visitation to the region and what sites over 12 months would provide valuable insights into the ongoing effectiveness of such an event and the flow on effect for wine producers within the region.

Finally, path analysis functionality could plot how visitors move between specific wineries and provide useful insights into typical wine routes visitors follow. This could also be applied across all tourism attractions within a region and provide insights into mix between wine attractions vs tourism attractions visitors engage within. However, this would require collaboration between multiple stakeholder groups within tourism regions beyond wine associations.

7. Extension

Communication of the findings within the study will be conducted in three ways. First, information will be distributed through trade newsletters such as Department of Primary Industry and Regional Development (DPIRD) and Wines of Western Australia. Information regarding the project was initially distributed by DPIRD in their newsletter in October 2019 when the project was launched. Second, Information seminars will be conducted as part of the Regional Programs initiative, with seminars planned in Swan Valley, Margaret River and Great Southern wine regions for September/October 2021. The CI will also be delivering a talk to the Margaret River Wine Association Cellar Door Committee on 22nd July and will touch on some key findings from the study. Further, after the WA seminar series has been delivered, a webinar series can be developed to provide extension of findings to producers in NSW, Victoria, Tasmania and South Australia. The CI will engage Wine Australia for assistance with this. Finally, the CI and Project Supervisor will be aiming to publish a range of research articles in various academic and trade journals.

8. Benefits to Researcher

This project has enabled the CI to extend research from their PhD studies through developing a better understanding of wine tourists and exploring range of techniques to best segment and profile them. Additionally, it has provided the CI with an opportunity to explore using innovative technology in the form of visitor analytics. This project has acted as somewhat of a pilot study to explore the capabilities and commercial application of the technology. This pilot study has facilitated the CI securing additional funding to move through to proof of concept stage with the aim of developing a cellar door analytics research/consultative tool to enable demand-driven research projects with the wine industry.

The net result of the project is that the CI has been able to take his PhD studies from the theoretical and apply it practically to the wine industry to examine wine tourist and cellar door dynamics in an applied fashion. It has provided a foundation in which the CI can use as a launch pad for further research to deliver further benefit to the industry.

The CI would like to thank Wine Australia and the industry partners for the opportunity and support throughout the project.

8. Appendices: To Follow.

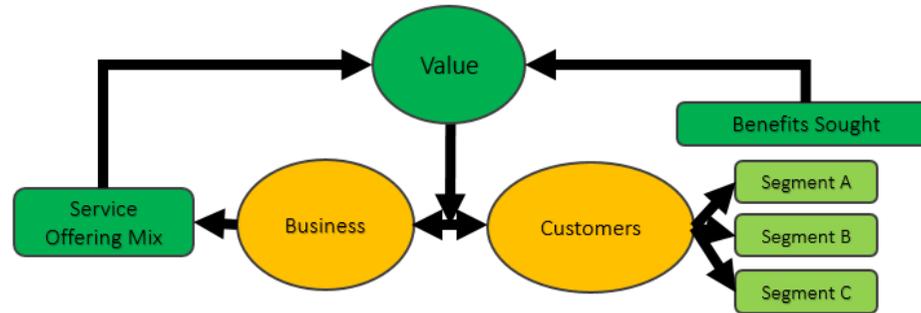
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Appendix A: Value Proposition Framework in a Wine Tourism Context

Potential Service Offerings:

1. Free tasting
2. Paid tasting (Premium wines)
3. Self-guided wine flight
4. Self-guided wine flight with food pairing
5. Bottle purchase + tasting plate
6. Sit down meal (restaurant)
7. Gift shop purchase
8. Gallery purchase
9. Winery/vineyard tour
10. Wine club sign-up



Survey Data Collected (Segmentation):

1. Product involvement
2. Motivation to visit
3. Attitude towards winery
4. Purchase type
5. Purchase amount
6. Willing to recommend
7. Revisit intention
8. Drinking occasions
9. Information Sources
10. Regular purchase location
11. Consumption frequency
12. Wine preferences
13. Demographics

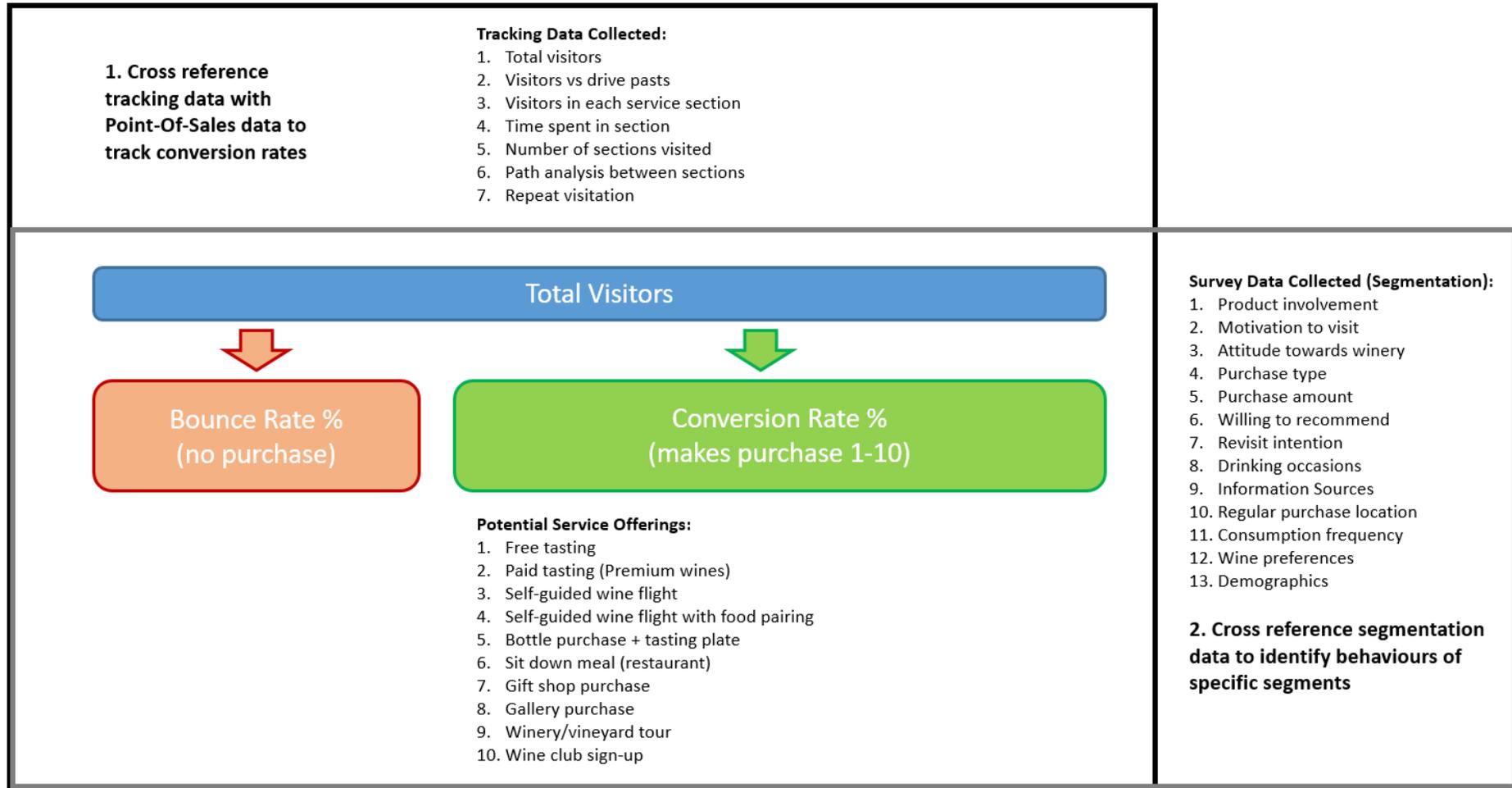
Appendix B: Example Service Offering Zoning: Winery A, Margaret River, Western Australia



Service Offering Areas:

1. Casual dining
2. Fine dining restaurant
3. Wine tasting counter
4. Gift shop/homewares
5. Gallery/museum

Appendix C: Triangulation of intercept survey data, visitor tracking data and POS data



Appendix D: Overview of Segmentation and Results

Table D1: Summary of Identified Clusters: Segmentation Bases (with Std Dev.)

	Mean (Std Dev.)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	LM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Percentage of Sample	100	42.0	24.1	23.5	9.7
Winery A (N(%))	181 (56.7)	66 (36.5)	50 (27.6)	47 (26.0)	18 (9.9)
Winery B (N(%))	138 (43.3)	70 (51.5)	27 (19.6)	28 (20.3)	13 (9.4)
Segmentation Bases					
Wine Product Involvement					
Product Importance	4.89 (1.60)	5.34 (1.17)	6.03 (0.89)	4.16 (1.14)	1.92 (1.16)
Hedonic Value	5.34 (1.61)	5.67 (0.89)	6.30 (0.67)	4.99 (1.01)	2.33 (1.31)
Symbolic Value	4.37 (1.61)	4.22 (1.32)	6.06 (0.76)	3.91 (1.10)	1.94 (1.07)
Risk Probability	3.59 (1.46)	3.44 (1.45)	3.48 (1.42)	3.92 (1.25)	3.73 (1.90)
Risk Importance	4.17 (1.59)	4.13 (1.34)	4.56 (1.56)	4.19 (1.34)	3.39 (1.97)
Motivation to Visit Winery					
Experience Wine	3.83 (2.12)	5.66 (0.98)	3.30 (1.90)	1.76 (1.04)	2.18 (1.36)
Socialisation	5.71 (1.58)	5.56 (1.47)	5.97 (1.46)	5.82 (1.79)	5.44 (1.57)

Table D2: Summary of Identified Clusters: Segmentation Bases (With ANOVA subscripts)

	Mean (Std Dev.)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	LM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Percentage of Sample	100	42.0	24.1	23.5	9.7
Winery A	181 (56.7)	66 (36.5)	50 (27.6)	47 (26.0)	18 (9.9)
Winery B	138 (43.3)	70 (51.5)	27 (19.6)	28 (20.3)	13 (9.4)
Segmentation Bases					
Wine Product Involvement					
Product Importance	4.89 (1.60)	5.34 ^a	6.03 ^b	4.16 ^c	1.92 ^d
Hedonic Value	5.34 (1.61)	5.67 ^a	6.30 ^b	4.99 ^c	2.33 ^d
Symbolic Value	4.37 (1.61)	4.22 ^a	6.06 ^b	3.91 ^a	1.94 ^c
Risk Probability (non-sig.)	3.59 (1.46)	3.44	3.48	3.92	3.73
Risk Importance	4.17 (1.59)	4.13 ^{abc}	4.56 ^{ab}	4.19 ^{abc}	3.39 ^{ac}
Motivation to Visit Winery					
Wine Experience	3.83 (2.12)	5.66 ^a	3.30 ^b	1.76 ^c	2.18 ^c
Socialisation (non-sig.)	5.71 (1.58)	5.56	5.97	5.82	5.44

Note: Superscript abc denotes ANOVA Bonferroni between group difference membership ≤ 0.05

Figure D1: Wine Tourist Segment Profiles

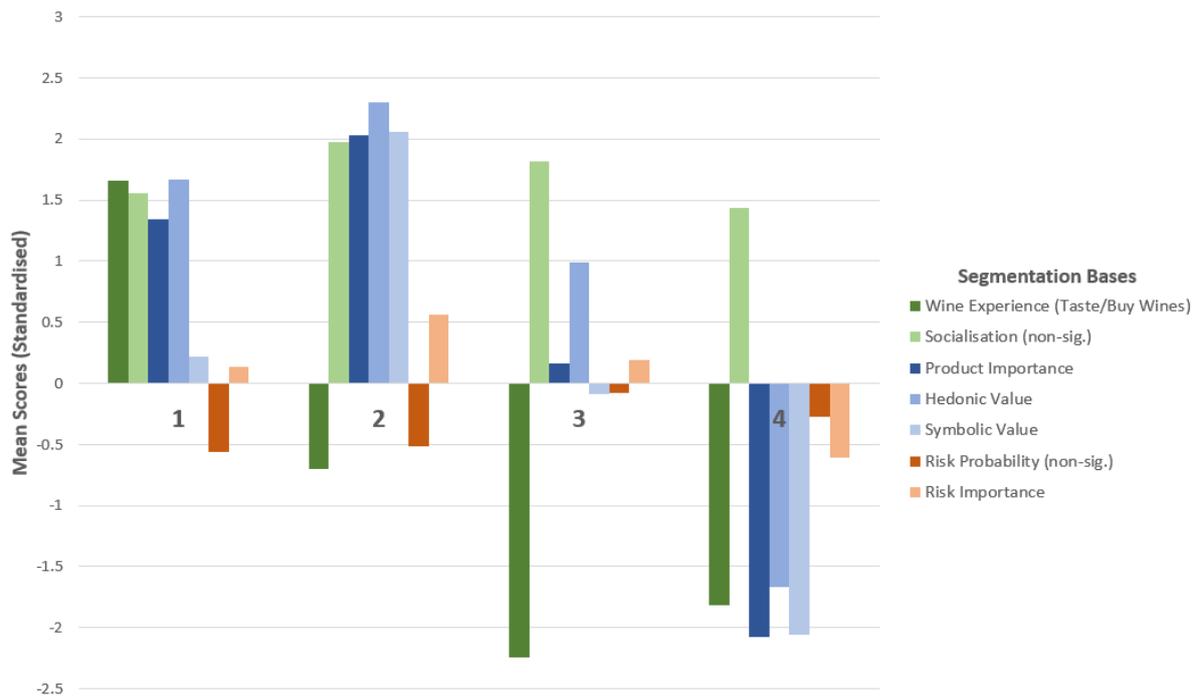
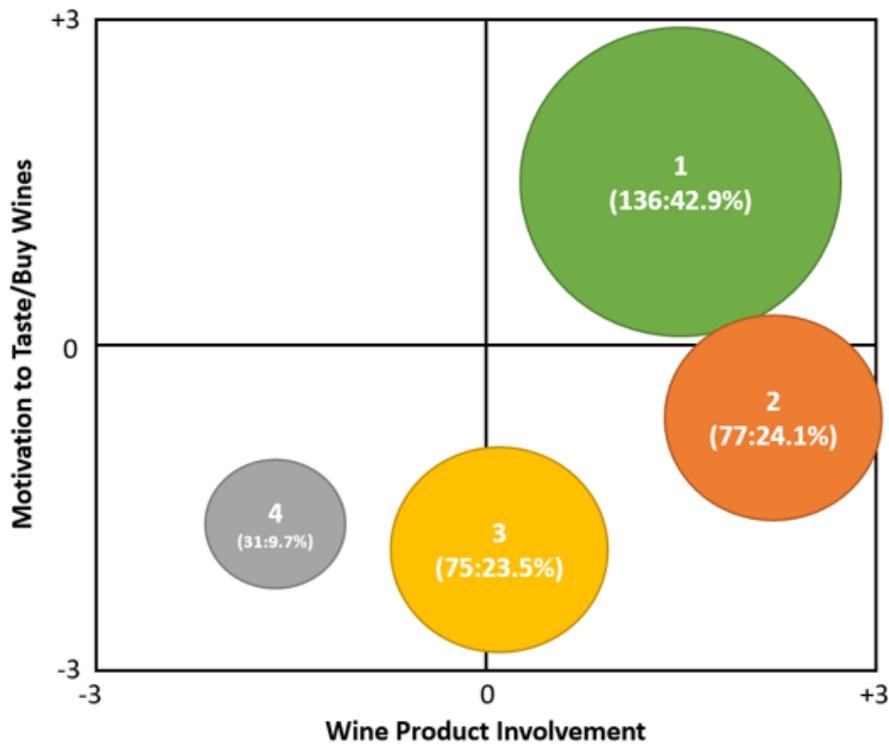


Figure D2: Wine Tourist Segments Represented via a Matrix Diagram



Appendix E: Wine Tourist Segment Profiles

Table E1: Demographics

	Total (Percentage)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	MM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Gender					
Male	130 (40.8)	54 (39.7)	29 (37.7)	30 (40.0)	17 (54.8)
Female	189 (59.2)	82 (60.3)	48 (62.3)	45 (60)	14 (45.2)
Age – Generations*					
iGen (18 – 24)	14 (4.4)	4 (2.9)	4 (5.2)	4 (5.3)	2 (6.5)
Millennials (25 – 39)	108 (33.9)	59 (43.4)	25 (32.5)	17 (22.7)	7 (22.6)
Gen X (40 – 54)	90 (28.2)	37 (27.2)	20 (26.0)	24 (32.0)	9 (29.0)
Baby Boomer (55+)	107 (33.5)	36 (26.5)	28 (36.4)	30 (40.0)	13 (41.9)
Family Lifecycle Stage (Marital Status/Age/Household Composition)					
Single	57 (17.9)	27 (20.0)	12 (15.6)	14 (18.7)	4 (12.9)
Double Income No Kids (DINKs)	77 (24.1)	33 (24.4)	21 (27.3)	15 (20.0)	8 (25.8)
Family	62 (19.4)	30 (22.2)	13 (16.9)	15 (20.0)	4 (12.9)
Single Family	24 (7.5)	11 (8.1)	5 (6.5)	4 (5.3)	4 (12.9)
Empty Nesters/Retiree	87 (27.3)	29 (21.5)	23 (26.4)	24 (32.0)	11 (12.6)
Single Empty Nesters/Retiree	11 (3.4)	5 (3.7)	3 (3.9)	3 (4.0)	0 (0.0)
Education*					
No-Post Secondary Qualification	69 (21.7)	18 (13.3)	19 (24.7)	22 (29.3)	10 (32.2)
Undergraduate Post-Secondary Qualification	112 (35.2)	59 (43.7)	25 (32.5)	19 (25.3)	9 (29.0)
Postgraduate Post-Secondary Qualification	137 (43.1)	58 (43.0)	33 (42.9)	34 (45.3)	12 (38.7)
Household Income					
Under \$25,000	6 (2.0)	2 (2.3)	2 (2.7)	0 (0.0)	1 (3.3)
\$25,001 - \$50,000	11 (3.6)	5 (3.8)	2 (2.7)	2 (2.9)	2 (6.7)
\$50,001 - \$75,000	23 (7.5)	6 (4.5)	8 (10.8)	7 (10.1)	2 (6.7)
\$75,001 - \$100,000	51 (16.7)	24 (18.2)	13 (17.6)	10 (14.5)	4 (13.3)
\$100,001 - \$150,000	67 (22.0)	34 (25.8)	11 (14.9)	14 (20.3)	8 (26.7)
\$150,001 - \$200,000	68 (22.3)	26 (19.7)	17 (23.0)	20 (29.0)	5 (16.7)
\$200,000 - \$250,000	32 (10.5)	13 (9.8)	11 (14.9)	6 (8.7)	2 (6.7)
\$250,001 - \$300,000	16 (5.2)	8 (6.1)	2 (2.7)	4 (5.8)	2 (6.7)
\$300,000+	31 (10.2)	13 (9.8)	8 (10.8)	6 (8.7)	4 (13.3)

Note: Chi-Square difference test - * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Table E2: Visitation Data

	Total (Percentage)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	MM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Visitation Time of Day					
Median	12:45	13:00	12:40	12:30	12:30
Duration of Visit					
Median (Minutes)	87	60.00	105.00	105.00	75.00
Mean (Std Dev.)***	92.14 (54.4)	76.85 ^a	106.84 ^{bc}	103.91 ^{bc}	94.26 ^{ac}
Have you visited this winery before?*					
Yes	182 (57.1)	67 (49.3)	50 (64.9)	44 (58.7)	21 (67.7)
No	137 (42.9)	69 (50.7)	27 (35.1)	31 (41.3)	10 (32.3)
How many times have you visited the region? (12 months)					
Once	74 (23.2)	35 (25.7)	14 (18.2)	18 (24.0)	7 (22.6)
Twice	86 (27.0)	37 (27.2)	17 (22.1)	27 (36.0)	5 (16.1)
Three times	48 (15.0)	20 (14.7)	14 (18.2)	7 (9.3)	7 (22.6)
Four times or more	79 (24.8)	31 (22.8)	23 (29.9)	16 (21.3)	9 (24.8)
I live in the region	32 (10.0)	13 (9.6)	9 (11.7)	7 (9.3)	3 (9.7)
Whom did you come with today?					
Alone	1 (0.3)	0 (0.0)	0 (0.0)	1 (1.3)	0 (0.0)
Organised Tour Group*	11 (3.4)	9 (6.6)	0 (0.0)	2 (2.7)	0 (0.0)
Friends*	114 (35.7)	39 (28.7)	27 (35.1)	33 (44.1)	15 (48.4)
Spouse/Partner	173 (54.2)	77 (56.6)	39 (50.6)	41 (54.7)	16 (51.6)
My child/children	49 (15.4)	23 (16.9)	12 (15.6)	8 (10.7)	6 (19.4)
Other family members/relatives	68 (21.3)	27 (19.9)	19 (24.7)	15 (20.0)	7 (22.6)
Business Associate	2 (0.6)	2 (1.5)	0 (0.0)	0 (0.0)	0 (0.0)
What service offerings did you interact with today?					
Wine tasting at tasting bar***	169 (53.0)	111 (81.6)	30 (39.0)	20 (26.7)	8 (25.8)
Fine dining in restaurant	114 (35.7)	39 (28.7)	34 (44.2)	30 (40.0)	11 (35.5)
Gift shop*	110 (34.5)	41 (30.1)	26 (33.8)	28 (37.3)	15 (48.4)
Casual dining	91 (50.3)	20 (30.3)	28 (56.0)	34 (72.3)	9 (50.0)
Surf gallery/Vintage car museum	20 (11.0)	4 (6.1)	5 (10.0)	9 (19.1)	2 (11.1)

Note: Chi-Square difference test - * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Note: Superscript abc denotes ANOVA Bonferroni between group difference membership ≤ 0.05

Table E3: Purchase Data

	Total (Percentage)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	MM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Did you make a purchase today?***					
Yes	221 (69.3)	98 (72.1)	59 (76.6)	45 (60.0)	19 (61.3)
No	98 (30.7)	38 (27.9)	18 (23.4)	30 (40.0)	12 (38.7)
How much did you spend?					
Median (\$)	100	100.00	100.00	75.00	80.00
Mean (\$) (Std Dev.)	126.24 (129.77)	128.53	132.28	113.94	128.26
Didn't Purchase/No Purchase on behalf*					
	49 (15.4)	22 (16.2)	7 (9.1)	10 (13.3)	10 (32.3)
Takeaway Wine (Proportion of Purchase)***					
0% of purchase	202 (64.5)	57 (42.2)	53 (69.7)	66 (91.7)	26 (86.7)
Minority of purchase: 1-50%	38 (12.1)	20 (14.8)	13 (17.1)	4 (5.6)	1 (3.3)
Majority of purchase: 51-99%	11 (3.5)	5 (3.7)	3 (3.9)	2 (2.8)	1 (3.3)
100% of purchase	62 (19.8)	53 (39.3)	7 (9.2)	0 (0.0)	2 (6.7)
Average Spend - 100% of purchase	105.97	114.76	52.20	NA	34.00
Conversion Rate (%)	35.5	57.8	30.3	8.3	13.3
Valid cases	313	135	76	72	30
Fine Dining in Restaurant (Proportion of Purchase)					
0% of purchase	213 (68.1)	101 (74.8)	44 (57.9)	47 (65.3)	21 (70.0)
Minority of purchase: 1-50%	5 (1.6)	3 (2.2)	2 (2.6)	0 (0.0)	0 (0.0)
Majority of purchase: 51-99%	28 (8.9)	12 (8.9)	11 (14.5)	3 (4.2)	2 (6.7)
100% of purchase	67 (21.4)	19 (14.1)	19 (25.0)	22 (30.6)	7 (23.3)
Average Spend - 100% of purchase	196.92 ^{sig^}	212.64	219.07	164.49	197.43
Conversion Rate (%)	31.9	25.2	42.1	34.7	30
Valid cases	313	135	76	72	30
Gift Shop (Proportion of Purchase)					
0% of purchase	304 (97.1)	130 (96.3)	74 (97.4)	71 (98.6)	29 (96.7)
Minority of purchase: 1-50%	6 (1.9)	3 (2.2)	2 (2.6)	0 (0.0)	1 (3.3)
Majority of purchase: 51-99%	0 (0.0)	0 (0.0)	0 (0.0)	0 (0.0)	0 (0.0)
100% of purchase	3 (1.0)	2 (1.5)	0 (0.0)	1 (1.4)	0 (0.0)
Average Spend - 100% of purchase	108.33	150.00	NA	25.00	NA
Conversion Rate (%)	2.9	3.7	2.6	1.4	3.3
Valid cases	313	135	76	72	30
Casual Dining (Proportion of Purchase)					
0% of purchase	94 (52.8)	46 (70.8)	23 (46.9)	15 (32.6)	10 (55.6)
Minority of purchase: 1-50%	19 (10.7)	6 (9.2)	5 (10.2)	6 (13.0)	2 (11.1)
Majority of purchase: 51-99%	13 (7.3)	6 (9.2)	4 (8.2)	3 (6.5)	0 (0.0)
100% of purchase	52 (29.2)	7 (10.8)	17 (34.7)	22 (47.8)	6 (33.3)
Average Spend - 100% of purchase	80.2 ^{sig^v}	67.20	89.38	76.76	75.00
Conversion Rate (%)	47.2	41.3	53.1	67.4	44.4
Valid cases	178	65	49	46	18

Note: Chi-Square difference test - * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Table E4: Wine-Related Attributes (Involvement; Consumption; Purchase Behaviour)

	Total (Percentage)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	MM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Product Involvement					
Product Importance***	4.89 (1.60)	5.34 ^a	6.03 ^b	4.16 ^c	1.92 ^d
Hedonic Value***	5.34 (1.61)	5.67 ^a	6.30 ^b	4.99 ^c	2.33 ^d
Symbolic Value***	4.37 (1.61)	4.22 ^a	6.06 ^b	3.91 ^a	1.94 ^c
Risk Probability (non-sig.)	3.59 (1.46)	3.44	3.48	3.92	3.73
Risk Importance*	4.17 (1.59)	4.13 ^{abc}	4.56 ^{ab}	4.19 ^{abc}	3.39 ^{ac}
Wine Selection Attributes					
External Cues (Std Dev.)***	5.02 (1.10)	5.00 ^a	5.42 ^b	4.77 ^a	4.66 ^a
Internal Cues (Std Dev.)***	5.62 (0.98)	5.74 ^a	6.04 ^a	5.37 ^b	4.68 ^c
Organic/natural techniques (Std Dev.)**	4.03 (1.68)	4.09 ^{ab}	4.45 ^{ab}	3.75 ^a	3.43 ^a
Novelty – I haven't tried before (Std Dev.)	3.91 (1.64)	4.07	4.00	3.76	3.36
Weekly Consumption***					
< 1 bottle/week	111 (34.9)	33 (24.4)	14 (18.2)	38 (50.7)	26 (83.9)
1-2 bottles/week	78 (24.5)	37 (27.4)	22 (28.6)	15 (20.0)	4 (12.9)
3-4 bottles/week	91 (28.6)	41 (30.4)	33 (42.9)	17 (22.7)	0 (0.0)
> 4 bottles/week	38 (11.9)	24 (17.8)	8 (10.4)	5 (6.7)	1 (3.2)
Typical Bottle Spend*					
< \$10	10 (3.1)	4 (3.0)	2 (2.6)	1 (1.3)	3 (9.7)
\$10 - 20	124 (39.0)	50 (37.0)	20 (20.0)	39 (52.0)	15 (48.4)
\$20 - 30	134 (42.1)	57 (42.2)	35 (45.5)	30 (40.0)	12 (38.7)
\$30 - 40	34 (10.7)	18 (13.3)	13 (16.9)	3 (4.0)	0 (0.0)
>\$40	16 (5.0)	6 (4.4)	7 (9.1)	2 (2.7)	1 (3.2)
Consumption Frequency***					
Daily	42 (13.2)	23 (16.9)	12 (15.6)	6 (8.0)	1 (3.2)
More than once a week	133 (41.7)	62 (45.6)	42 (54.5)	27 (36.0)	2 (6.5)
Once a week	69 (21.6)	32 (23.5)	16 (20.8)	15 (20.0)	6 (19.4)
Fortnightly to bimonthly	50 (15.7)	16 (11.8)	7 (9.1)	21 (28.0)	6 (19.4)
Less than bimonthly	25 (7.8)	3 (2.2)	0 (0.0)	6 (8.0)	16 (51.6)
Purchase Location					
Large national retailers	216 (67.9)	96 (70.6)	45 (58.4)	55 (73.3)	20 (66.7)
Independent specialist bottle shops	145 (45.6)	63 (46.3)	40 (51.9)	33 (44.0)	9 (30.0)
Online wine stores*	58 (18.2)	30 (22.1)	14 (18.2)	13 (17.3)	1 (3.3)
Direct from winery – Cellar door***	159 (50.0)	75 (55.1)	47 (61.0)	32 (42.7)	5 (16.7)
Direct from winery – Online*	81 (25.5)	40 (29.4)	24 (31.2)	13 (17.3)	4 (13.3)
Wine club subscription**	45 (14.2)	28 (20.6)	12 (15.6)	5 (6.7)	0 (0.0)
Restaurants	106 (33.3)	45 (33.1)	50 (35.1)	48 (36.0)	23 (23.3)
Bars/Clubs	52 (16.4)	25 (18.4)	12 (15.6)	13 (17.3)	2 (6.7)

Note: Chi-Square difference test - * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Note: Superscript abc denotes ANOVA Bonferroni between group difference membership ≤ 0.05

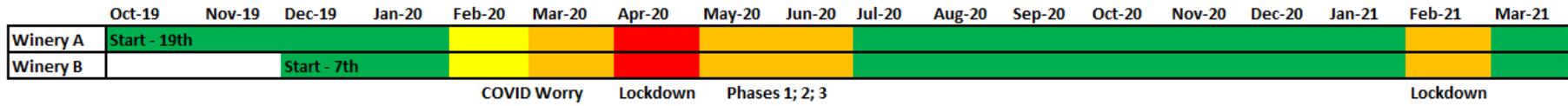
Table E5: Visitation Attributes (Winescape; Motivation; NPS; Attitude to Tasting Fee + Winery)

	Total (Percentage)				
	Pooled Sample (N = 319)	HM HInv (N = 136)	MM HInv (N = 77)	LM MInv (N = 75)	LM LInv (N = 31)
Winescape Attributes					
Setting	6.51 (0.80)	6.48	6.65	6.47	6.44
Atmosphere – Heritage	4.85 (1.36)	4.68	5.01	4.95	4.88
Atmosphere – Aesthetic	5.73 (1.09)	5.83	5.79	5.52	5.65
Wine Value***	5.33 (1.14)	5.79a	5.54a	4.97b	4.72b
Wine Quality***	5.57 (1.09)	5.91a	5.60ac	5.21bc	4.89b
Service Staff***	6.04 (1.12)	6.29ac	6.03ac	5.70bc	5.79ac
Complementary Product	5.40 (2.53)	5.10	5.51	5.93	5.17
Motivation to Visit					
Wine Experience***	3.83 (2.12)	5.66a	3.30b	1.76c	2.18c
Socialisation	5.71 (1.58)	5.56	5.97	5.82	5.44
Attitude to Tasting Fee					
	3.50 (1.86)	3.70	3.21	3.28	3.60
Attitude to Winery					
	6.27 (0.93)	6.23	6.29	6.42	5.99
Net Promoter					
Promoter	203 (84.2)	85 (80.2)	47 (87.0)	54 (90.0)	17 (81.0)
Passives	21 (8.7)	14 (13.2)	3 (5.6)	4 (6.7)	0 (0.0)
Detractors	17 (7.1)	7 (6.6)	4 (7.2)	2 (3.3)	4 (19.0)

Note: Chi-Square difference test - * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Note: Superscript abc denotes ANOVA Bonferroni between group difference membership ≤ 0.05

Appendix F– COVID Timelines



Lockdown Dates		
Lockdown	31/3 - 27/4	
Phase 1	27/4 - 17/5	10 people max outdoor gatherings
Phase 2	18/5 - 5/6	Sitdown wine tasting required
Phase 3	6/6 - 26/6	Sitdown wine tasting required
Phase 4	27/6 - 1/2/2021 unrestricted, with some capacity restrictions	
Lockdown	1/2 - 5/2	
Masks	5/2 - 13/2	
Phase 4	14/2 - Mar	