



CELLAR DOOR, ONLINE & WINE CLUB PURCHASING IN AUSTRALIA 2017



Cellar Door, Online and Wine Club Purchasing in Australia 2017

Report overview



CELLAR DOOR, ONLINE & WINE CLUB PURCHASING IN AUSTRALIA 2017

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Report price:

GBP 1,000
USD 1,300
AUD 1,800
EUR 1,200

The **Cellar Door, Online and Wine Club Purchasing in Australia 2017** report includes:

- A 69-page PowerPoint report with the latest information regarding the Australian wine market, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews, with representatives from the Australian wine market such as:
 - 2x Cellar Door Manager
 - 1x Wine Room Manager
 - 1x General Manager, Cellar Door
 - 1x Guest Services Manager
 - 1x Brand Ambassador
 - 1x Tourism Marketing Manager

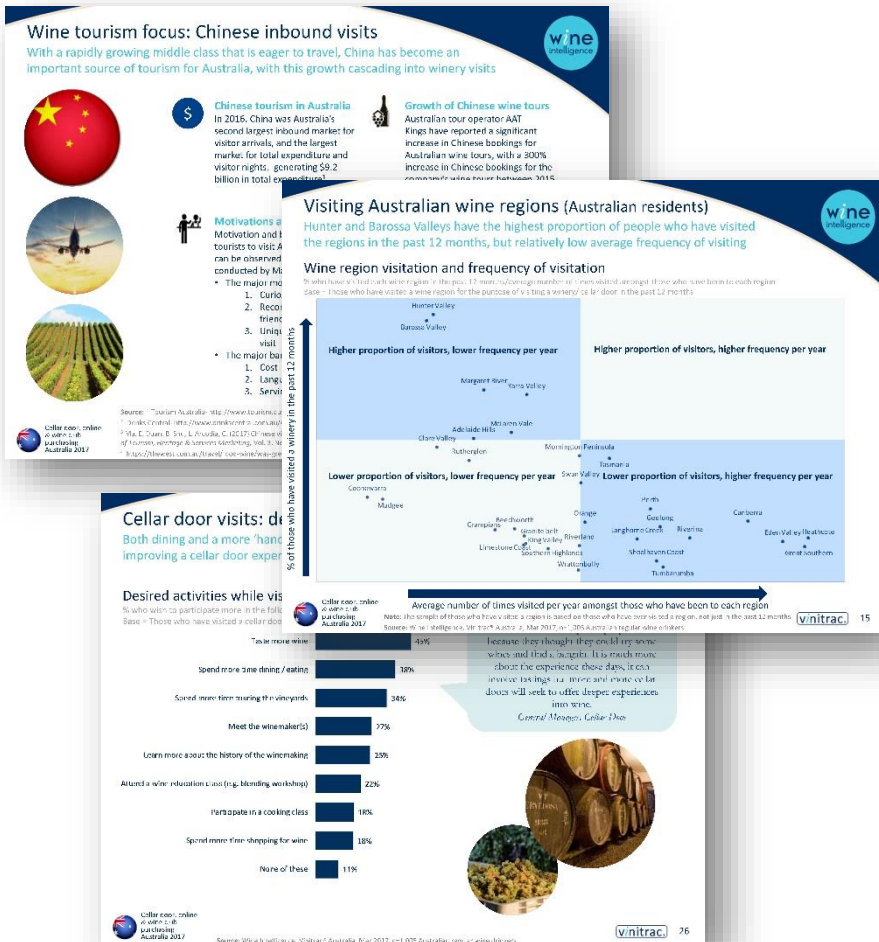


Cellar door, online
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Australia 2017

*All prices exclusive of VAT, GST,
or relevant local sale taxes at the current rate

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Sample output



Content

- A detailed breakdown of wine regions visited for cellar door, available by state of residence, age and Portrait group
- Wine region visitation, frequency of visitation and number of cellar doors visited per trip
- Motivations and barriers to visiting cellar doors
- Actual and desired activities while visiting a cellar door
- Cellar door, online & wine club purchasing behaviour, including analysis of club wine channels usage frequency, basket purchase, bottle spend and Portraits segmentation
- Online stores and wine club purchase analysed by Portrait groups
- Motivations and barriers to online channel purchase including barriers to increasing purchases from cellar door, online channels and wine club purchasing
- Detailed profiling of those who purchase from cellar door, online and via wine clubs

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Introduction 1/2

Wine Intelligence presents its inaugural Cellar Door, Online & Wine Club Purchasing report for the Australian market 2017. This report aims to explore winery and cellar door visitation in Australia, as well online purchasing and via wine clubs.

Over half of regular wine drinkers have visited a winery or cellar door in the past 12 months, and when speaking to members of the trade, it is clear there has been a shift in what consumers are wanting to get out of their visits to wineries and cellar doors. Whilst purchasing and tasting wine is a motivator for visiting cellar doors, it is becoming more about the overall experience and value that can be added, rather than simply a trip to stock up on wine. The average spend on a bottle of wine is higher at the cellar door than through other channels, due to the opportunity to engage consumers with premium wines, thus developing sales at higher price points. Visitors are increasingly more demanding, judging value through elements such as personalised and more in-depth hands-on wine experiences, casual and shared food offers and exclusive ranges.

The volume of sales alone purchased at the cellar door no longer remains the primary motivator for wine business as the recognition grows for the ability of cellar doors to act as a vital brand building and ambassador-generating channel within the marketing mix. With this in mind, increasing emphasis is placed on the role of engaging and effective cellar door staff as the face of the brand.

Cellar Door, Online and Wine Club Purchasing in Australia 2017



Introduction 2/2

With over 1,600 cellar doors operating in Australia¹, understanding the attitudes and motivations of Australian regular wine drinkers who are visiting wine regions and wineries is crucial in shaping offerings to further entice visitors. The Hunter and Barossa Valleys are visited by the highest proportion of Australians, yet rank lower for multiple visits within 12 months, suggesting that these regions are visited perhaps as more of a one-off annual occasion. Unsurprisingly, Australian drinkers opt to travel to cellar doors closer to home.

42% of regular wine drinkers in Australia have purchased wine whilst visiting a cellar door. However, cellar door purchasing generates the lowest basket size, with those buying online, remotely from a winery or via a wine club more likely to buy over 6 bottles in one purchase, reflecting the implications of minimum purchasing requirements for shipping.

Although gaining considerable momentum in the last decade, online sales either from a retailer or directly from the winery are still placed outside the top 8 wine buying channels for Australia regular wine drinkers. When consumers do decide to purchase through these channels, they are turning to the online offerings of familiar bricks and mortar retailers such as Dan Murphy's, Liquorland and BWS. Wine drinkers in Australia are typically content with the range offered in traditional retail channels and that alleviating shipping costs and wanting bigger discounts on wine brands were the two key incentives for further purchase via the online channels.



Vinitrac®:

- The data for this survey was collected in Australia in March 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 1,005 Australian regular wine drinkers (March 2017)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Australian regular wine drinkers in terms of age, gender and region



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Trade interview methodology:

- Trade interviews were conducted with seven experienced industry professionals in Australia's wine trade in August 2017
- Interviews followed a pre-determined discussion guide, and covered overall wine tourism trends, the role of the cellar door in the overall operations of a winery and opportunities and threats for the industry
- The seven interviewees were members of the wine trade working in different roles focusing on wine tourism and direct-to-consumer retail covering five different wine producing states. The positions included:
 - 2x Cellar Door Manager
 - 1x Wine Room Manager
 - 1x General Manager, Cellar Door
 - 1x Guest Services Manager
 - 1x Brand Ambassador
 - 1x Tourism Marketing Manager

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

REPORT PRICE: • AUD 1,800 • GBP 1,000 • USD 1,300 • EUR 1,200 • 2 Report Credits

Format: 69-page PowerPoint (PDF)

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