



Small wineries – Balancing the Making and the Marketing

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Abstract

How small wineries actively approach marketing is the key determinant of their sustainability. Using a narrative approach to case study research, the paper investigates the balance of critical success factors that guide operations at a newly-profitable small boutique winery, and in particular examines the implications for marketing. The case study provides an instructive example of how one small winery has taken purposeful market focus and actioned it in order to survive. An increased market focus for small wineries requires them more clearly about where the product ends up, rather than the more palatable concentration on the making of good wine.



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INTRODUCTION

The comment from the industry has been that we are getting ...(is)..., you've all done it really well and we are sort of sitting in here saying: Christ, it's a shambles. What are we doing? All they see is what is out there. It has gone well. It's taking a long while. We have got to operate the business now, we've got to drive the business...(because) ... we've come out of that set-up stage and the next couple of years are going to be really interesting from a business perspective, I suppose for me, learning a lot more about that and how it all runs and operates and how do we sell.

-Manager/winemaker Winery X

This paper is the first outcome from a research project about how small wineries see their critical success factors for sustainability, and how they act on them. We present a case study of a relatively new winery - Winery X for anonymity. Winery X has achieved quite remarkable advances in sales, critical reputation, market profile and brand development in around just four years. The paper investigates the balance of critical success factors that guide operations at this newly-profitable small boutique winery, and in particular we examine the implications for marketing.

How small wineries actively approach marketing is the key determinant of their sustainability (ACIL 2002). Gaining access to domestic and international markets, and even its basic distribution channels is problematic in New Zealand (Beverland 2000), and remains so in Australia (ACIL 2002). There are dire warnings for small wineries who get things wrong. The momentum and scale of winery development in Australia is phenomenal: "...a new wine producer every 61 hours over the past 3 years!!" (ABC, 2003). There are about 1,650 wine producers in Australia and the top 22 wine companies control 92% of domestic sales. This leaves the other 1600 or so producers fighting over just 8% of the market and the majority are very small family businesses and the immediate outlook is tough. Put simply, there are too many people competing for a tiny slice of the market place. The access to the marketplace for a small winery is constrained by (ABC, 2003; ACIL, 2002; Halliday, 1997): increased competition from other small labels; a lack of differentiation between competitors with regions; static consumption rates domestically; despite exports increasing 20%, the limited interest of overseas distributors and merchants in low volume producers; increasing competition from US, South American, and Eastern European producers; and the loss to the forces of Woolworths and Coles-Myer of independent wine merchants who traditionally took product from smaller producers. There is a dire prediction that "Up to 40 per cent of Australia's wineries are tipped to fail in the next few years as conditions change" (Todd, 2003).

We report on critical success factor choice and action by perceptions of the winery's manager. We attempt to illuminate those perceptions as clearly as possible through extensive quotations. By highlighting the narrative, we hope to demonstrate what Peter's (2000) describes as the utility of a more microscopic analysis where descriptions that the actors "...provide of their working life provide a rich body of evidence..." about the way their organization really performs. Words delivered in context have bite and meaning. By reprocessing and homogenising data, research can lose some of the colour and depth and meaning of the original encounter. So here our approach is to gain a sense of 'realism', by giving accounts of the pictures people hold of the 'gritty' reality of their lives (Silverman



2000).

The longer term research project is to explore commonalities and differences in the articulation and operationalisation of critical success factors at small wineries – be they in the ‘successful’ category or otherwise. This paper presents the first of our case studies on ‘successful’ small wineries. Sampling for involved drawing a short list of ‘successful’ wineries as profiled in wine interest media publications and the Melbourne Age, and further refinement by discussions with proprietors of two retail wine specialist buyers from the hospitality industry. Interviews were taped and transcribed, and data was analysed using a matrix approach (Miles and Huberman 2000) that listed critical success factors by operational example.

IDENTIFYING AND ACTIONING CRITICAL SUCCESS FACTORS

The first and most important critical factor for Winery X is fruit supply because “...our wine can only taste as good as the grape’s quality...”. Winery X controls about 65 per cent of the vineyards they draw from, by either owning them or actively managing them. With the other 35 per cent, fruit is bought from other vineyards but there is still input “we basically tell our growers how we want them to grow the fruit, what we are looking for quality wise, and we basically reward them for quality... We sit down in January or February with these guys and have a cup of tea at the vineyard and have a wander through and say: last year your Chardonnay price was \$1,700 and this year it's going to be the same if it is up to a certain standard based on end usage. If we think the wine, say for instance, we had a parcel of Chardonnay that we bottled on its own, we might give them \$2,500 a tonne for it because we are going to ask \$50 for it at the cellar door...”

Fruit is a big number one because Winery X is out there selling themselves as a producer of premium quality wine. They are really trying to offer is “...volume of flavour per dollar...”. The brief when they started was that they can't take on the Southcorps and the Mildara Blass's of this world, as they have got too much money to spend to buy shelf space, and all that sort of thing. So Winery X's focus is on wine flavour, with a reasoning that people are going to buy brand because it tastes good, it's got quite nice, simple packaging, and the stunning winery environs and stand-out architecture, “...so it's the whole sort of package, I suppose, we put together...”.

After good fruit, the next most important factor is the winemaking “...if the fruit is good, our wine is going to be good and that's what I'm paid for...”. The winemaking is important as it “...goes hand in hand with the fruit...”. After the fruit and the winemaking, the third critical success factor revolves around marketing. This third factor “...is getting away from the production of the thing, it is about the perception in the marketplace....There is so much wine branding, I suppose, branding and marketing because there's just so much wine on the market...You go to a bottle shop, 10 new labels every time, incredible.”

Winery X has to give people a reason to buy its brand, so that whole marketing exercise is a massive thing on its own for a small winery, giving samples for wine writers, getting reviews, newsletters, and letting people know what is going on: “...yesterday I did a tasting with all the executives from (organization), all that sort of stuff, just going out and getting it known and pushing it”. Part of the business strategy is to involve the winemaker in the marketing side of things: “...I do tastings and demos and that sort of stuff...it's part of my job as winemaker. People like to talk to the winemaker... if I'm there with the bottle of wine and say: would you like to try some wine and generally we get around to it, that yes I do make the wine, you see people perk up...(compared to) if I'm the girl that pours the wine or the bloke that pours the wine, okay. So as a marketing tool we (the winemaker) are pretty valuable to the market. We haven't actually got a marketing department if you want to call it that...We leave the actual marketing drive (to) a girl that does it, she does a great job and we all



operate pretty strongly as a team”

A major choice in the point of departure for any small winery is the compromise struck between making what they aspire to, then try to market it, or making to the market in the first place: “I know the styles that I like and I make them on that style and it's good. In that respect, we have gone to the market and said: here it is....(but) obviously we are not making a white Zinfandel or a light pissy Pinot or whatever... the wines are good, and that has been probably the biggest difference with our company compared to a lot where we've sort of made the stuff and gone out and said: here it is. We haven't started very small and tiny, I suppose; we have come out with 10,000 cases of booze and said: we've got to sell it, get out there and sell it. It's our drive to do it. It's worked pretty well so far. There's a lot of work. We have entered (indistinct) plenty of time. Things like the packaging and the labelling, the newsletters, those sort of things, a very collaborative effort. We get everyone's viewpoint”.

Despite starting in a big way rather than the incremental approach typifying small wineries, Winery X has not spent a lot of money on external marketing experts, but relied on team-work from everyone – ranging from accountants to tasting room staff to owners, and learning. Export is a classic example. Winery X considered engaging a specialist marketing consultant, then purposefully decided to try using their own resources, creative energy, and personal connections: “Our first export shipment took a long time to get it right. Now we know what's going on. If we bought an external person in, they would have said: just give it to us, we will sort it out. We wouldn't have known what was going on, so we've learnt as we're going and that's really valuable...”. Winery wants to move about a third of their wine to the UK and USA: “There's a lot of incentive to export, there's good tax breaks or whatever you get when you export, no GST. We can sell our wine at better prices than we sell to our distributor, and all this sort of stuff. So really important, and at the moment the Yanks and the Poms love it. They put one quid on the table and they get \$3.00, so it's a really cheap option for them to do”.

To successfully market overseas requires doing things, the wine and the packaging, a little bit differently stylistically that local and international competitors: “Australian wine has got a view now in the UK especially that it's a style...A lot of the wine is shifted through the supermarket chains...(is)..very much an Aussie style wine, fruit grown in the Riverland and taste the sunshine, sweet and bubbly and not particularly complex or different...they've developed new processes and new productions for the techniques which has made a lot of wine taste the same, Aussie wine....(but in contrast)...I think what people like about (Winery X) is that we've said: bugger it, we see a huge future in this for us so we are going to invest a lot of dough here, which we've spent on the building and we have got some really nice gear out there to help us do it all. We bought vineyards, all that sort of thing, we are going to lead and be a premium producer. There hasn't been many people doing it in the last few years...”.

Winery X contrasts its approach to making and marketing to other relatively recent start-ups. There are very big - tax driven schemes like Pilandri from the Margaret River - \$80 million to spend from ‘mum and dad’ investors after they went to the market : “It's extraordinary amounts of money. I was in Sydney and every bus shelter in Sydney has got Pilandri on the side of it.... I don't think they're particularly great. They're good wines but they are very much in that \$12 to \$15 sort of thing...Pilandri coming just like that and landing the marketing big punch. Massive....(and)...They're crushing their four and a half thousand tonnes of grapes in their second year. Enormous.”

Yet despite not having Pilandri-style resources of ‘punch’ Winery X products are selling because a market segment believes they are good wines: “...it has to taste good, so the minute that we start trying to put something down people's throats, trying to sell something to someone that we don't believe in, they won't believe in it and we are bugged. So obviously we have got a pretty free range



of what fruit we buy. We all agree on what we are going to buy, we are not going to go to Tasmanian and buy Riesling, we will buy shiraz from McLaren Vale, (source) shiraz in Heathcote, we've got a vineyard in Heathcote, we are buying Chardonnay from Yarra in Geelong and if we've got to pay good dollars to get it, well, that's what we will do. And things like the packaging, we have got really favourable comments. We've just been lucky, I suppose. You can see the (describes Winery X packaging features) ...That looks fantastic. They stand out. Just simple things...".

Winery X does use any consultants for marketing. There "marketing person" does many things besides, but has got postgraduate marketing qualifications and experience. "She came from (a different) industry. She was at (the organization). When people hear (the organization), they sort of go: holy, shit, all we know about (the organization) is it fell over. But it was pretty well marketed."

For Winery X, their distributors are a key dimension in their marketing activities – as advisors, sounding-boards and enactors. They have a distributor in each of the Eastern states who buy from Winery X at a reduced rate and add their margin to it and go out sell direct to restaurants and bottle shops and alike. Winery X has found its priority shift more towards the distribution side of things now: "...we are working really closely with these guys. We get reports from them, we will go and spend a day on the road every month, go around and shake people's hands and say: g'day, this is a new wine. They all love it. But we have got to build this brand domestically. Export is great now but to build a brand on export is a really risky business so we have got to really cement our position here...(by)...working closely with those guys to get the brand out there so (Winery X name) becomes a winery people know about. They don't go: what? (Winery X name)? Vacuum cleaners? But it's changing. You (researchers) know what (Winery X name) is now!" .

At the same time as strengthening agent-centred marketing activities, Winery X is moving to build mailing list, internet and cellar door sales which will give improved margins. For example a bottle that Winery X sells direct to a consumer at \$17 is worth nearly three times in margin compared to one sold through a distributor. Distribution is the priority now, but "...Once we get to the point where everyone knows who we are, the focus will probably shift again trying to get more people down there".

Another critical success factor is to identify, harness and evaluate skills "We have got the team and they work together and it's a team effort to do the labels and things like that, but how do you figure out who has got the right skills and where they need be updated and where you are with those sorts of things? If we look at the winery, me doing it here, I had a mate who came down yesterday, ran through a few barrels, sort of consultancy type thing, I guess, because it is really, really easy to convince yourself you are doing everything right, and not only from a winemaking point of view, from a marketing point of view, all that sort of thing... We are judging, I suppose, our marketing based on feedback and it's pretty easy to get feedback from the marketplace when you are putting something like a new bottle of wine out there. It's really easy. People are very, very willing to say: hey, this is shit, mate. What are you doing? Or they are going to say: this is fantastic. People never seem to hold back...it's more valuable a lot of the times to speak to the punter who says: I don't like it. We will put that (comment) away. Because they are the people that are paying for this stuff." So making sure the feedback loop from marketing activities is both unbroken and heeded is a priority.

Winery X has won high-profile show awards for wine quality, but has a very individual 'take' on pursuing them, and their use in marketing: "...we've had a bit of success in the show system. It's not something that we are broadcasting, we are not putting stickers...(as) ...I think it's a really short-term way to promote your brand. I know enough about the show system, I have been involved with it long enough to know that it's a lottery. You can win a trophy at the Melbourne Show and then get nothing at the Sydney Show or vice-versa. I've seen the same wine three months apart, different judges. Look



at us, we got a gold at Melbourne for our Pinot. At Seymour we got nothing, we got absolutely kicked. We got a shocking score for it. So instead of getting 56 points out of a possible 60, which is eighteen and a half from each judge, which is a gold, we get 42, which is 13 and a half from each judge. Same wine, different set of judges. I know it's the same wine, we bottled it the same day, it's out of the same box. So you give these people (consumers) this expectation there is going to be a gold sticker on your label. Where's the gold this year? It mustn't be any good”.

So Winery X uses the show system as a forum, an opportunity to look at their wine alongside everyone else's wines. They can compare say their pinots with dozens of competitors which is a lot cheaper than going out and buying them all, which Winery X does some of as well. “So shows are fun. We enter them, but we take them with a grain of salt really when we think it's bloody great but when we don't we remember the time we did. Things like reviews and comment by the press is pretty important. In the weekend paper there is a wine thing, bits and pieces, it's always nice to get a review on that sort of thing. We work pretty closely with the press, keep them up to speed as to what we are doing. There is enough people that we know, especially the press, that we know well enough that will ring and say: we have got the wine but I'm not going to review because I think it stinks. They haven't done it yet. They do do that and there is no point in them giving negative reviews...They don't enjoy writing shit reviews”.

Winery X had a clear view of three things for the future that would continue them on the road to success: “We have got to maintain quality fruit, which is absolutely vital...people have to keep drinking wine. At the moment there is these health benefits of wine, (and) Aussie wines are very hot worldwide. Number three, encompasses the marketing of wine styles...If we can sort of keep that ticking along, (we) see ourselves as a leader in the marketplace”.

On the other side of the coin to what needs to occur with the fruit, the making and the marketing, what things could happen that would be a major threat and derail progress made thus far? “the first one would be to have to recall wine, for any reason. There is a fantastic case of a mob called Vincorp that bought Virgin Hills. They released a range of wines called Trio Station. They have vineyards in Margaret River, vineyards in Victoria, and they have this bloke flying between. Anyway, they released their first Trio Station range of wines with much hoopla and hurrah and the first thing the wines weren't that crash hot, they were okay but they wanted big money for them. And secondly they put coloured plastic stoppers - you would have seen these artificial corks around the place, and they bottled everything, 30,000 cases or something, under the stopper and they were the first people to use this particular brand in the country and they were whiz bang, all the rest of it, and people were breaking the corks trying to get them out, they couldn't pull them out. It's a big new brand, buy four cases, get one free, pour it, and so they had to recall all the booze. I don't know what they did with it. I've got no idea. Those sorts of things...You release one dud, or something happens with one batch of wine and you are history, or if we move a container of wines to the UK and it's cloudy or something”.

The second threat would be a vineyard based problem such as the Phylloxera vine louse: “It will spread through and decimate the industry...20 per cent of the vines in South Australia are planted on resistant root stocks. That will happen, I'm convinced of that...but we are covered”. As a response, all the vineyards at that Winery X owns and controls are planted on grafted root stocks.

Number three threat would be if somehow exports fell over, as Winery X has short term plans for a third of its production going to the UK and up to 50 per cent of the business exported by 2005. Winery X has an interesting marketing initiative where people in Australia can buy cases of wine at cellar door prices and have them delivered to recipients in the UK at nominal freight costs as they go across in the winery's major container shipments.



Vision 2025, a document the wine industry put together in 1995, had a 30 year vision for the wine industry expansion, a lot of based on exports. In reality that 30 year plan for plantings has been carried out in just seven years. Yet while Winery X sees the pace of grape planting and wine production as a hazard to the industry, it does not feel particularly vulnerable as an entity: “I think if we keep our eye on the ball, we are very aware there is a hell of a lot of grapes out there but I think it's more important for us to say this is what we are doing, we are a consistent product and people can buy (Winery X), every year they can buy it, they know that the blend hasn't gone from 2,000 cases to 20,000 cases, it's going to taste good, and they're going to get their value for money. People can keep planting grapes, and good on them for planting grapes because we are going see a massive, massive oversupply soon. If it doesn't happen next year, it will next year or the year after. Just where mainly the big guys, the Southcorps and Beringer-Blas, all the plantings that they put in the ground in the last three or four years are coming on strength, and they are massive planting. You go to the Southeast of South Australia and this is our 400 hectare block that we put in in one season and about 800 hectares other there we developed over the last few years. Here is our 1400 hectare vineyard. So we are going to see oversupply, we are going to see either vines, a, not picked or, b, prices are going through the floor. That's going to happen and the inland irrigated areas, if you plant your grapes in a premium area you can grow premium grapes and a winery can get \$30 a bottle for it you are doing okay. For us, we are not buying from any broad acre, big vineyards, we are keeping things pretty small. So, no, I don't see that as a huge threat. We do view every other beverage, I suppose, anyone that buys a bottle of Coca-Cola isn't buying a bottle of our wine so maybe we should be viewing them as the enemy”.

Forecasting the market demand and resultant financials has been problematic. In the first year of the production phase, the winery never planned to, and did not, make a profit. Break even is expected for the second production year (the interview period), and “...we will make money next year...It's a big call, that's why we are all bloody going overseas again (this time to USA). Got to sell more booze. The targets that we've aimed that we've given ourselves, they are probably pretty ambitious but we are all brainwashed enough to know that (indistinct) so we've got to do it”.

The first trip, to the UK, ended with \$350,000 worth of wine sold to be delivered over an 18 month period “.. so that can go into the cash flow, the proposed cash flows and that sort of thing”. The hope is to do the same in the States, come back with people committed to take 1,000 cases of this and 400 cases of that so the business ends up with “...some pretty big pillars, some absolutes. ...yes, we know where we are going but ...how much wine are we going to sell? I don't know. There are distributors out there trying to sell it. We pulled them (the forecasts) out of the air...But that's a living document, it's always chopping and changing, and we do have 12 months trading under our belt. We know that October, November, December, January, February are busiest times and that happened last year, it happened this year. Winter is really quiet so we can make some better decision as to when should we release our wines and when should we have lunches down there, all this sort of stuff to maximise the amount of people that are flowing around. We are noticing every week an increase in sales and that's good, that's what we need to do”

Trying to interest people through personal contact is a key marketing strategy: “if they about know you, they stop at the winery, and word of mouth spreads. It's quite interesting, we do hear people saying, I say it too, try this new bottle of wine, it was great. And you tell people and other people, they come down and have a look”.

A very successful marketing strategy has to publicise explicit limits on Winery X's premium line: “That's the thing, isn't it, the limit. That is a really interesting thing. We have just released a Pinot, 120 cases of them, at \$50 a bottle and it's just gone...It's just really interesting to actually see that in motion where people know there is 120 cases. We had a restaurateur from Melbourne down here and he wanted to buy the lot. He said: I will buy every bottle you have. He got 20 dozen, he got the



most, we sold him 20 dozen of the stuff so 40 six packs. He loves it, he can sell it, he can put the price up on his wine list. Great story to sell. There is very little of it. The packaging is outstanding (hand waxed capsules) (and). You know it's in a big, heavy bottle and you put the price up and make it scarce and people buy it”.

It is more important to see how other wineries act in marketing and distribution than explore or mimick their winemaking. As far as competitors go, “ We buy their wines and try their wines, (but have not) not spoken about how they make it. I know how they do it, and it boils down to the same thing every single time is the vineyard. They've got their vineyards, balance their old vines, they're getting low crops, they spend all their time in the vineyard. There is no secrets out here. People have been making wine for thousands of years. Converts the sugar to alcohol. You can't actually ever dilute flavour. If you have grapes that have got 100 per cent of flavour, the only way you can dilute that flavour is by adding water. You can't actually lessen that flavour by doing a thing in the winery, if you know what I mean, by fermenting it at a hot temperature, or a cool temperature, old oak, new oak. You can use too much but there is no secrets, it's all vineyard. These vineyards are grafted on the oldest soil in the world”. Winery X isn't a hugely technological winery, it has got standard stainless tanks and refrigeration. The view is that lots of other wineries will be making good wine from good fruit with the same methods. The problem for many competitors is not to right fruit and turn it into the right wine, but it is how to sell it.

Winery X has learnt some interesting lessons on the marketing road. Domestic marketing initiatives have required a much heavier presence of the winemaker doing the rounds with distributor agents than had been anticipated. International marketing projects had been a similar learning experience. Contracting a good distributor is one part of the story, but overseas-based buyers want to meet with the winemaker rather than Winery X's own administrative representatives or overseas proxies.

Winery X had one of the main buyers for Sainsbury's UK chain drop in recently. She was just passing through and she was basically not interested in Winery X much, but was dropping in as a reciprocal favour to some of Winery X's London contacts. “She goes to Brown Brothers, Southcorp and buys a million cases...(and we) Just give her a look at what is going on in the rest of the industry and where things are going and this sort of stuff. She was here and she had been to 42 wineries in 18 days or something, and she hadn't a single sample. She just told them: ship them, they just got back to London and they analyse them and she said, in the cold light of day in the lab, nobody buys, nobody orders, nobody does anything out on the road. Ship them. Put them in a box, send us 10 samples...and no way would they pay for the samples”. While Winery X could not fill orders of the magnitude that Sainsbury's currently put out, there are possibilities in the new premium stores that are soon to be launched. In working hard to make this connection end up in a visit, Winery X's London agents were thinking of a potential major buyers future shape rather than current practices.

The path to marketing to export can be a challenging and fraught one. The first attempts to send samples to some contacts in the US in Mississippi was a disaster “...we tried to send them some samples, and DHL picked them up and off they went and DHL brought them back a week later with all these horrible stickers all over them. It's illegal to send alcohol through the post in the State of Mississippi. Two years or \$5,000. They landed in Mississippi and the DHL guys: get them out of here. Straight back to customs, straight back out of there. Not interested...50 something (states)...(and)...their alcohol laws date back to prohibition, Al Capone (indistinct)”.

CONCLUSIONS

An increased market focus for small wineries requires them more clearly about where the product ends up, rather than the more palatable concentration on the making of good wine. Winery X provides an



excellent example of how one small winery has taken purposeful market focus and actioned it. The approach by Winery X in Australia concurs with Beverland's observation for small New Zealand wineries: "To survive wineries will need to develop strong brands, offer adequate product support, be prepared to move away from cellar door sales and mailing list as means of distribution and form relationships with distributors...All of this requires an increased emphasis on marketing strategy if wineries are to survive".

Whilst the most important critical success factors for Winery X are the quality of fruit used and hence wine made, management has a clear line of sight to marketing strategy as the critical success factor that will distinguish its ultimate performance from that of others. A single case does not permit generalizability of findings, but this research generates some key themes for further exploration of wider patterns and experiences amongst other small wineries. A key issue for further research is whether the ability to access good fruit and make good wine is more universally achievable than the implementation of a good marketing strategy, and what can be done about it if that is the case. Another research issue is come to grips with the costs and benefits of the export market for small wineries, and the reality rather than glamour of exports in winery sustainability.

We have to keep ahead of what people expect, whether it's in our label design, or whether it's in our wine quality or whether it's - I don't know - in how long our grass is outside. We want to be leading, we don't want to be bloody led, if that makes sense, so we have got to really anticipate, or not anticipate, we have got to make things, I suppose, you've got to lead stuff. People talk about do the public dictate how your wine is tasting, how your business is run? No way. Our sort of role model business is are people who have always led, they've gone out and said: no, this is what we are doing, this is it. Definitely have to do that. We don't want to fall into the trap of doing things that everyone else does.

Manager/winemaker Winery X



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