IMPLEMENTATION OF MARKETING COMMUNICATION TOOLS IN THE AUSTRIAN WINE INDUSTRY

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Prepared by the University of Sopron

István Széchenyi Economic and Management Doctoral School

within the framework of the International Joint Cross-Border PhD Programme in International Economic Relations and Management

Supervisor: Dr. Tamás Czeglédy

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Dissertation to obtain a PhD degree

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ABSTRACT

Due to structural changes in the Austrian wine industry, renewals in the management agendas of wineries are an inevitable consequence. Frequently, economic opportunities are not seized because comprehensive knowledge is lacking, and no corresponding objective has been defined. These deficits are particularly visible in the areas of marketing and especially communication, also for end customers. It is therefore desirable for Austrian wineries to take measures in precisely these business areas in order to turn current deficits into opportunities.

To answer the research question: ”Can a marketing communication model be created for wineries whose implementation leads to measurable success of small and medium-sized enterprises in the Austrian wine industry?”, the following steps were taken:

- The status quo of the Austrian wine industry was examined in terms of historical development, facts and figures on current corporate structures, vineyard areas, wine production and consumption, as well as distribution channels.
- Selected marketing communication measures in general were examined in terms of their significance in Austria in order to place them in the context of the Austrian and international wine industry in a further step.
- Own data tailored to the research topic was collected. For this reason, five experts were interviewed on topics such as success factors, current use of marketing communication tools and best practice examples in the Austrian wine industry. Subsequently, a survey among wine consumers was conducted about their consumption behaviour, criteria for buying wine and product characteristics as well as famous names and brands in the Austrian wine industry.
- Finally, all the results, both of the literature review and the research work carried out, were cast into the form of a marketing communication model, which can be implemented by small and medium-sized enterprises in the Austrian wine industry. Finally, the research question was answered and future research possibilities in the field of the Austrian wine industry are presented.

The creation of an integrated communication model for small and medium-sized enterprises in the Austrian wine industry represents a scientific novelty in this sector. Elaborated scientific research, the professional experience of the author and the extraction of the key findings as well as the subsequent combination of all relevant aspects lead to a new scientific approach for wineries in the area of marketing communication.

IMPLEMENTATION OF MARKETING COMMUNICATION TOOLS IN THE AUSTRIAN WINE INDUSTRY

1 Introduction

In Austria, wine is part of the history and culture. For thousands of years the natural product has been inseparably associated with the Alpine Republic. But wine is still in vogue; its producers are considered stars and its production sites are considered architectural masterpieces. The positioning of Austrian wine as a product is closely linked to the keywords "high quality" and "good value for money" in the minds of consumers.

Despite the comparatively small size of the production areas and the resulting potential production volume – Austria currently ranks 27th in the world ranking of the wine producing countries (Organisation internationale de la vigne et du vin, 2020) – the Austrian people are very proud of their wine and show this by consuming almost 80% (Austrian Wine, 2020a) of the total production themselves.

Problem statement and importance of the research work

Although the Austrian wine industry seems to be under a shining star, it is, nevertheless, new to many Austrian winegrowers to be economically profitable in their business. Due to the structural changes of the industry – away from a side-line business and towards a main occupation –, renewals in the management agendas of companies are an inevitable consequence. Frequently, economic opportunities are not seized because – on the one hand – comprehensive knowledge is lacking and – on the other hand – no corresponding objective has been defined. These deficits are particularly visible in the areas of marketing and especially communication, also for end customers. It is therefore advisable to take measures precisely in these areas in order to turn current deficits into opportunities, especially against the background that the Austrian wine industry is integrated into the European one and thus plays a significant role in exports. Therefore, the competitiveness of the Austrian wine industry is also of great importance.

This assertion is supported by Michael Porter's diamond model. As can be clearly seen in figure 1, according to Porter, there are correlations between the parameters "factor conditions" (the existence and availability of production factors such as labour, knowledge, capital, infrastructure and raw materials), “demand conditions” (national demand determines how much a company will develop; if domestic demand is high and demanding, the company will respond to it), “firm strategy, structure and rivalry” (rival companies promote competition and move the whole industry forward), “related and supporting industries” (the geographically closer similar companies are, the more they can cooperate, which benefits the whole industry), “chance” (this includes all factors that cannot be influenced) and “government” (the active promotion of innovation by the government, to investment incentives and purchase support programmes, but also to the thwarting of competition) and the successful operation and thus the competitiveness of individual companies and, more broadly, nations (Recklies, 2001).

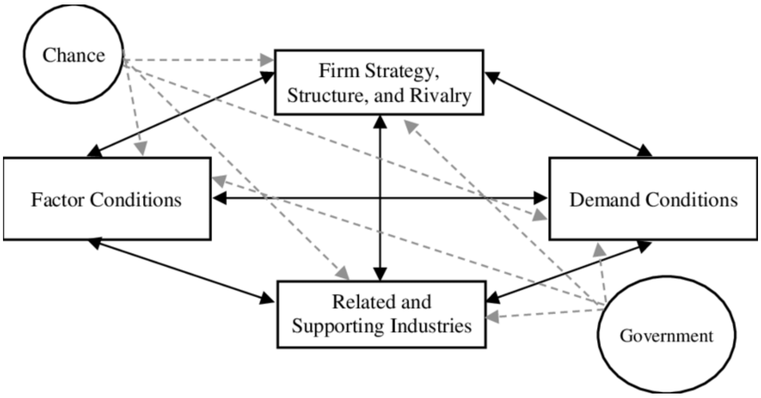

Figure 1: Michael Porter’s Diamond Model.
Source: Tsiligiris, 2018.

For this reason, it is important to strengthen the position of the companies within the Austrian wine industry and thus the entire sector of the economy, and this work is intended – with the achievement of the aim of the research work presented below – to make its contribution precisely to this point.

Objective of the research work

This work is aimed at supporting small and medium-sized enterprises in the Austrian wine industry by pointing out that marketing communication tools that are implemented correctly can lead to greater economic success. To achieve this goal, a marketing communication model shall be created, which is intended to provide small and medium-sized enterprises in the Austrian wine industry with guidance on how to improve the marketing communication tools they already use and which tools they should supplement if necessary, in order to be able to operate more successfully. It is important to mention that this marketing communication model should be designed in such a way that its implementation is as simple as possible for all interested companies.

It is essential to point out that the successful use of the marketing communication tools presented here presupposes that a winery has already perfected or optimised the other processes and aspects of its business, such as logistics, production, quality control and financial management, and manages them effectively. Without this, there is no marketing plan to ensure the success of the business.

These interdisciplinary relations of business activities are described by Michael Porter's value chain (figure 2). The interplay of the primary activities of inbound logistics, operations, marketing and sales, outbound logistics and customer service, as well as the supporting activities of procurement, technology development, human resource management and firm infrastructure, clearly shows that marketing is one part of a whole that contributes to the creation of customer value. It is the task of every company to examine the costs and performance in each of these value-creating activities and to find ways to optimise them (Kotler and Keller, 2006, p. 38 f). This paper therefore focuses on the value-creating activity of the field of marketing and sales. However, it should be emphasised that the interdisciplinary connections between the individual areas should not be underestimated.

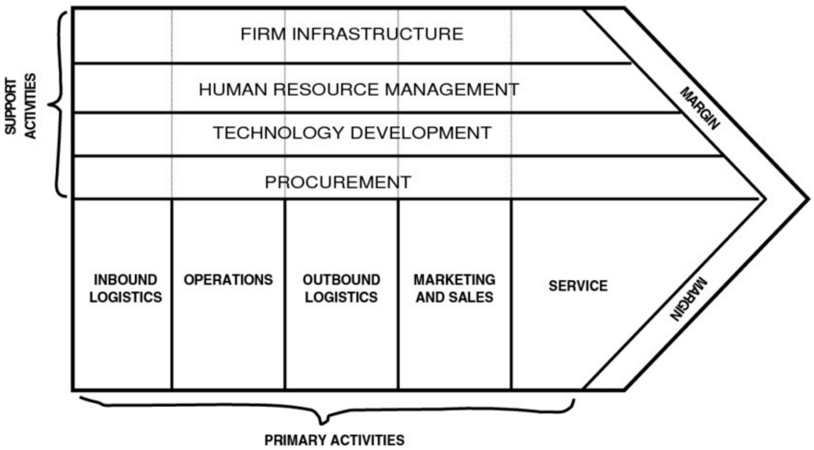

Figure 2: Michael Porter's Value Chain.
Source: Posadas, 2006, p. 42-69.

Defined target group of the research work
The target audience of the present research work is on the one hand the academic community, but on the other hand it is aimed at winery owners and persons in charge of small and medium-sized wineries in Austria who wish to become more successful.

When talking about small and medium-sized enterprises in the Austrian wine industry, they must be defined: A suitable unit of measurement in this case is the number of litres produced in bottles. The defined target group of the work is those enterprises that produce and bottle between 5,000 and 100,000 litres of wine. In 2009 these were 3,729 enterprises, of which 1,358 produced more than 30,000 litres and thus – according to the Austrian Wine Marketing Board – fall into the category "relevant for export" (Österreich Wein, 2020b, p. 42). While the use of targeted marketing communication measures is desirable for wineries producing less than 5,000 litres, it is not absolutely necessary for the sale of the production due to the small quantity, though. Also, those wineries that produce more than 100,000 litres (481 farms in total (Österreich Wein, 2020b, p. 42) constitute a minority in the Austrian wine industry and are therefore not the core target group of this study. It should be explicitly mentioned that in the present case there was a deliberate deviation from the EU definition (European Commission, 2020) of an SME.

Structure of the research work and applied research methods
To answer the research question: *"Can a marketing communication model be created for wineries whose implementation leads to measurable success of small and medium-sized enterprises in the Austrian wine industry?"*, the following steps were taken:

1. Literature research

In a first step, the status quo of the Austrian wine industry was examined in terms of historical development, facts and figures on current corporate structures, vineyard areas, wine production and consumption, as well as distribution channels.

Subsequently, selected communication measures in general were examined in terms of their significance in Austria in order to place them in the context of the Austrian and international wine industry in a further step. The background of this selection was that at each step of the process care was taken to discuss tools that can be implemented by small and medium-sized enterprises in the Austrian wine industry themselves at manageable cost, where the degree of independence of the realisation is as high as possible and implementation can be carried out quickly.

2. Qualitative and quantitative research

The next step was to collect own data tailored to the research topic. For this reason, first, five experts were interviewed on topics such as success factors, current use of marketing communication tools and best practice examples in the Austrian wine industry. By doing so, a basis of the current situation of the marketing communication sector was presented. Subsequently, end consumers were queried by means of electronic questionnaires about their consumption behaviour, criteria for buying wine and product characteristics as well as famous names and brands in the Austrian wine industry. All topics were selected in such a way that, in addition to important general information, the experts' opinions could be counterchecked and complemented when appropriate by the answers given by the end consumers. Among others, the following *groups of hypotheses* were examined and answered:

Shopping locations

H1: There is a relation between the shopping locations for wine and the information-seeking behaviour about wines and wineries.

H2: There is a relation between the shopping locations for wine and the attendance at wine-related events and fairs.

Awareness of wineries and trends

H3: There is a relation between the awareness of selected wineries and the attendance at wine-related events and wine fairs.

H4: There is a relation between the awareness of selected wineries and the information-seeking behaviour about wines and wineries.

H5: There is a relation between the awareness of trends and the attendance at wine-related events and fairs.

Demographic relations

H6: There is a relation between the demographic data age, income and highest completed education of wine consumers and the information-seeking behaviour about wines and wineries.

These groups of hypotheses are intended to show relevant relations between purchasing channels, communication channels and consumer behaviour in order to generate valuable

results which subsequently contribute to deriving recommendations for action for Austrian winegrowers.
The hypotheses were verified by statistical analysis of the respondents' answers given in the questionnaire and are described in detail in chapter 6.

It should be mentioned that it is necessary to answer the hypotheses in order to be able to sufficiently answer the research question, which is inextricably linked to the hypotheses.

3. Creation of a marketing communication model

In the final step, the results, both of the literature review and own research work carried out (both qualitative and quantitative research), were superimposed and finally cast into the form of a *marketing communication model*, which can be implemented by small and medium-sized enterprises in the Austrian wine industry.

This elaborated model as well as a worksheet especially prepared for small and medium-sized wineries in Austria will not be found in the main part of the thesis, but in the appendices. The reasons for this are, on the one hand, that the scope of the entire model would go beyond the scope of this work and, on the other hand, because the model and the accompanying worksheet can be regarded as an independent work.

Finally, the research question was answered and future research possibilities in the field of the Austrian wine industry are presented.

2 Overview and status quo of the Austrian wine sector

In order to understand the Austrian wine industry, it is worth taking a brief look at its history and analysing the current situation with regard to corporate structures, wine-growing regions and vineyard areas as well as wine production in Austria. Furthermore, data on wine consumption in Austria and the domestic wine production are given, followed by facts about distribution channels of Austrian wine. Finally, the importance of Austrian wine as an economic factor is highlighted, before concluding the chapter with benchmarks for the wine industry.

2.1 The history of the Austrian wine industry

Bronze Age grape seed findings prove a viticultural tradition in Austria that is already thousands of years old (Österreich Wein, 2020a). Around 700 B.C., the Celts, and probably even before them the Illyrians, cultivated vines in a very simple form of viticulture on the territory of present-day Austria (Österreich Wein, 2020a; Siegel et. al., 2004 p.686, Smith Bianchi & Gaubert-Turpin, 2018, p.104; Postmann, 2010, p.29ff). In the first century B.C., the Romans began a systematic form of viticulture in the territory of present-day Austria (Österreich Wein, 2020a; Egle, 2007, p.89ff).

The second great wave of viticulture was heralded in 795 AD by the decree "Capitulare de Villis" of Charlemagne. This decree regulated viticulture and provided information on the applicable wine law (Österreich Wein, 2020a; Postmann, 2010, p.29).

The period of the 10th, 11th and 12th centuries was dominated by monasteries (Österreich Wein, 2020a; Egle, 2007, p.90f). Not least due to their activities, in the Middle Ages, viticulture in Austria developed far beyond its present borders (Postmann, 2010, p.30). In 1359, Rudolf IV imposed a ten percent beverage tax under the name of "Ungeld". In addition, the lords of the manor also collected mining rights and a large number of tolls, which cities and sovereigns demanded for the import and transit of wine. Thus, viticulture and gastronomy also became a determining economic factor (Österreich Wein, 2020a; Egle, 2007, p.92).

In the 15th and 16th centuries, the area under vine in Austria reached its greatest expansion. It is assumed that it was at least three times larger than today (Österreich Wein, 2020a). In 1524, the Hungarian Queen Maria granted the winegrowers in the wine village of Rust the privilege of burning a capital "R" into their wine barrels as an early protection of origin (Österreich Wein, 2020a). This "R" also confirmed the tax exemption for exports (Egle, 2007, p.92f).

Under Maria Theresa (1740 - 1780) and her son Joseph II (1780 - 1790) viticulture was once again strongly promoted. This period also saw the beginnings of the scientific reappraisal of viticulture in Austria (Österreich Wein, 2020a). The Josephine circular decree of 17 August 1784 allowed everyone to "sell or serve the food, wine and must produced by himself at any time of the year, how, when and at what price he wants". It is thus the forerunner of the "Buschenschankverordnung" (regulation on wine taverns), which enabled the triumphal procession of “Heurigen” and “Buschenschänken” (taverns) in Austria.

In 1907, the first Austrian wine law came into force, which, among other things, lists the permissible wine treatment measures and prohibits the production of artificial wine. After the collapse of the Habsburg Monarchy (1918), the area under vines in Austria shrank from about 48,000 hectares before the First World War to about 30,000 hectares by the 1930s (Österreich Wein, 2020a).

Based on the misguided developments of the first post-war decades, the 1970s saw massive problems in the Austrian wine industry. These culminated in a cyclical drop in prices for cask wines in 1984. The adulteration of wines with diethylene glycol in order to artificially produce "high-quality sweet wines" led to the so-called "wine scandal" in 1985. As a result, exports decreased almost to zero. As a reaction to this, a new, strict wine law was introduced which, among other things, required a complete audit of wine stocks (Österreich Wein, 2020a; Egle, 2007, p.97ff; Siegel et al., 2004, p.696; Smith Bianchi & Gaubert-Turpin, 2018, p.104; Johnson, 2004, p.436f; Klinger & Vocelka, 2019, p.234ff). After Austria's accession to the EU in 1995, the wine law of the European Community was also adopted.

With the Weinviertel DAC (Districtus Austriae Controllatus, which means controlled designation of origin), the first regionally typical wine of origin came onto the market in 2003, followed in the next few years by the areas of Central Burgenland, Traisental, Kamptal, Kremstal, Leithaberg, Eisenberg, Neusiedlersee, Wiener Gemischter Satz, Rosalia, Western Styria, Southern Styria, Vulkanland Steiermark, Carnuntum and Wachau (Österreich Wein, 2020a).

2.2 Facts and figures

The following chapter is dedicated to facts and figures of the Austrian wine industry.

A detailed analysis of available data is necessary to understand the market and to be able to make decisions for the future on the basis of the given information. For this purpose, it is essential to know the basic conditions, such as corporate structures, vineyard areas and wine production on the one hand, and to understand the wine consumer in Austria, on the other hand. Only on this basis and with the background knowledge of current distribution channels can sound decisions be made.

2.2.1 Corporate structures in Austria

Over the last 30 years, the structure of the wineries in Austria has changed massively, both in terms of farm size and number. On the one hand, there has been a major decrease in the number of wineries of less than one hectare in size and overall, while on the other hand, the average size of farms of more than 5 hectares has increased significantly. This also has an impact on the type of farming: The larger a winery is, the higher the proportion of full-time farms. The number of farms has declined by 69% since 1987 and in 2015 was 14,111. The average farm size has increased from 1.28 ha per farm (1987) to 3.22 ha per farm (2015) (Österreich Wein, 2020b, p.42).

When it comes to bottling plants in the Austrian wine sector, the number of those wineries bottling quality wines has decreased from 6,481 holdings in 2009 to 4,210 holdings in 2019 Österreich Wein, 2020b, p.42).

When talking about export of Austrian wine, the number of wineries relevant for this distribution channel – according to the Austrian Wine Marketing Board they are wineries with a sold quantity of more than 30,000 litres of wine –, however, has increased from 976 in the year 2009 to 1,839 in 2019. In contrast, the number of small farms with a sales volume of less than 30,000 litres has decreased from 5,505 in 2009 to 2,371 in 2018. This corresponds to a decline by almost 57% (Österreich Wein, 2020b, p.42).

The above-mentioned figures clearly demonstrate the structural change in the Austrian wine industry within the last years.

2.2.2 Wine-growing regions and vineyard areas in Austria

The following lines are dedicated to the wine-growing regions and the vineyard areas in Austria.

Figure 3 shows the wine-growing regions in Austria. It can be clearly seen that the wine-growing regions are concentrated in the eastern part of Austria and thus in the federal states of Lower Austria, Vienna, Burgenland and Styria.

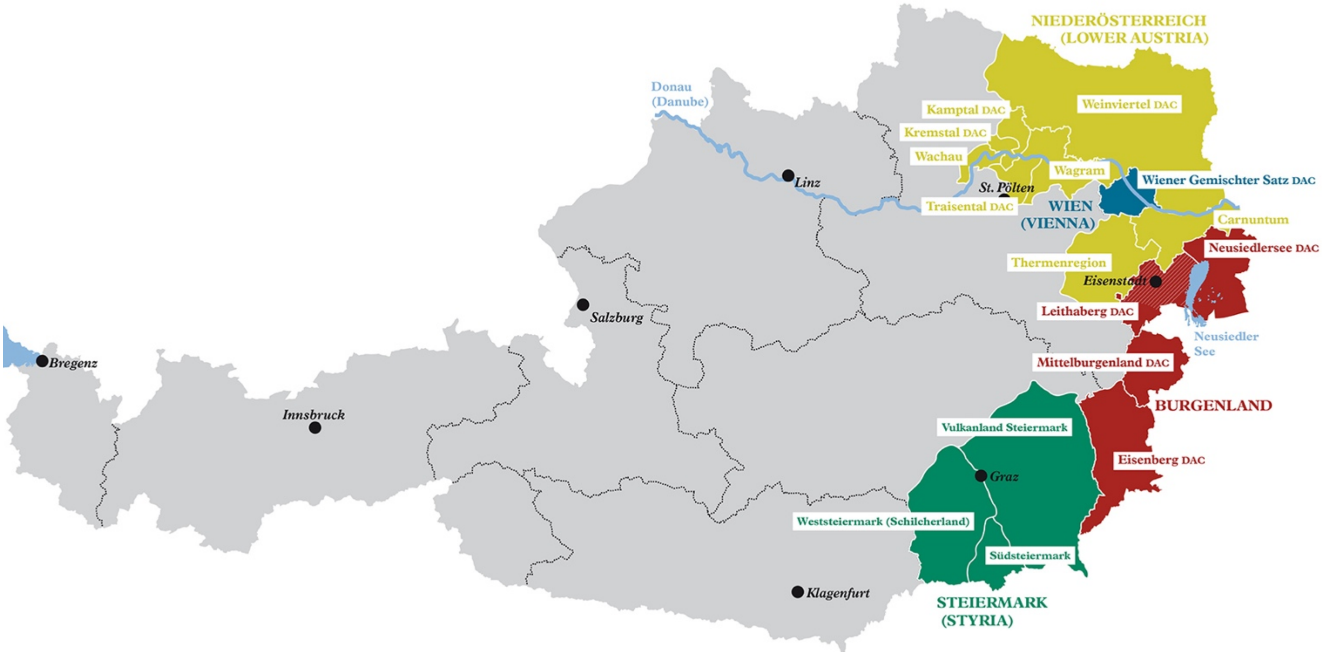

Figure 3: Map of Austrian wine growing regions.
Source: Österreich Wein, 2020d. Own representation.

In order to get an overview of the vineyard areas in Austria, a look is taken at the „Weingartengrunderhebung" 2015 – the basic vineyard survey of 2015 – and at feedback from the above-mentioned wine-growing regions of Lower Austria, Burgenland, Styria and Vienna. The main data source of the vineyard survey was the system "Wein-Online" of the Federal Ministry of Agriculture, Forestry, Environment and Water Management (BMLFUW). The data of the other provinces were collected directly by means of questionnaires (primary survey). All data originate from the Austrian Wine Marketing Board.

According to this survey, the area of vineyards in Austria amounted to 45,574 ha in 2015 – with Lower Austria being the largest wine-growing region with approximately 28,000ha, followed by Burgenland with 13,000 ha, Styria with around 4,000 and Vienna with 600 ha. The planted vineyard area was 45,439 ha, which is 94 ha or 0.2% less than stated in the last basic vineyard survey in 2009. Another finding of the survey was that the long-term trend from white wine to red wine can no longer be confirmed. While the area under white wine increased by 2.3% to 30,502 ha compared to 2009, the area under red wine decreased by 4.9% to 14,937 ha. With a white wine area of 67.1% of the planted wine area, Austria can be considered a typical white wine country (Österreich Wein, 2019a, p. 4f; Schultz in Statista 2020a).

According to the World Economic Report of the OIV (International Organisation of Vine and Wine) of April 2020, in 2019, Austria was in 27th place among the wine-growing countries with an area of 48,000 ha. For comparison: Spain took first place with a total area under vine of 966,000 ha. Austria thus holds 0.7% of the world's cultivated areas (Organisation internationale de la vigne et du vin, 2020, p.5; Schultz in Statista 2020a).

An interesting development is shown by the change in organic vineyard areas in Austria from 764 ha (1.8% of all vineyards) in 2000 to 6,001 ha (14.2% of all vineyards) in 2018 (Österreich Wein, 2020b, p.20, according to the Federal Ministry of Agriculture, Regions and Tourism). This fact proves a shift in the attitude of the winegrowers in Austria towards organic winegrowing.

2.2.3 Wine production in Austria

The following lines are dedicated to the wine production in Austria.

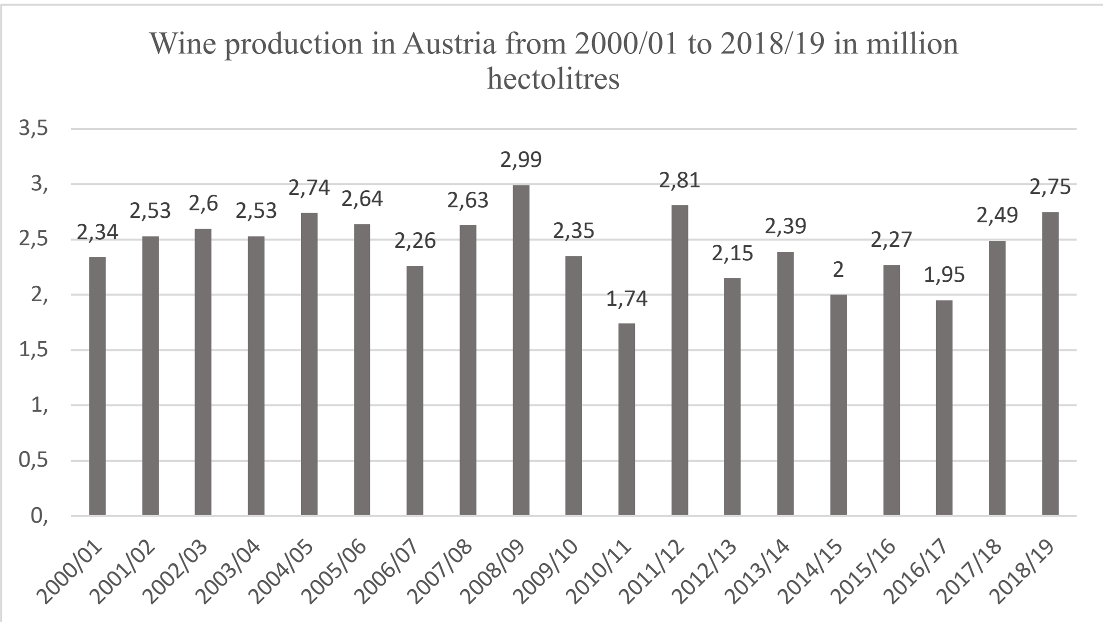

Figure 4: Production of wine in Austria in the years 2000/01 to 2018/19 in million hectolitres.
Source: Statistik Austria, 2020a in Statista. Own representation.

Figure 4 depicts the wine production in Austria from 2000/01 to 2018/19.
On an annual average, about 250 million litres of wine are produced in Austria (Schultz in Statista, 2020a). To put these figures in an international context, a comparison is drawn with the wine-growing countries Italy, France and Germany: In 2019, the volume of wines produced in Italy was 47.5 million hectolitres, in France 42.1 million hectolitres and in Germany 9 million hectolitres (Organisation internationale de la vigne et du vin, 2020, p.8).

2.2.4 Wine consumption in Austria

When it comes to the consumption expenditure of Austrian private households for alcoholic beverages from 1995 to 2018, the data shown in figure number 5 are analysed below.

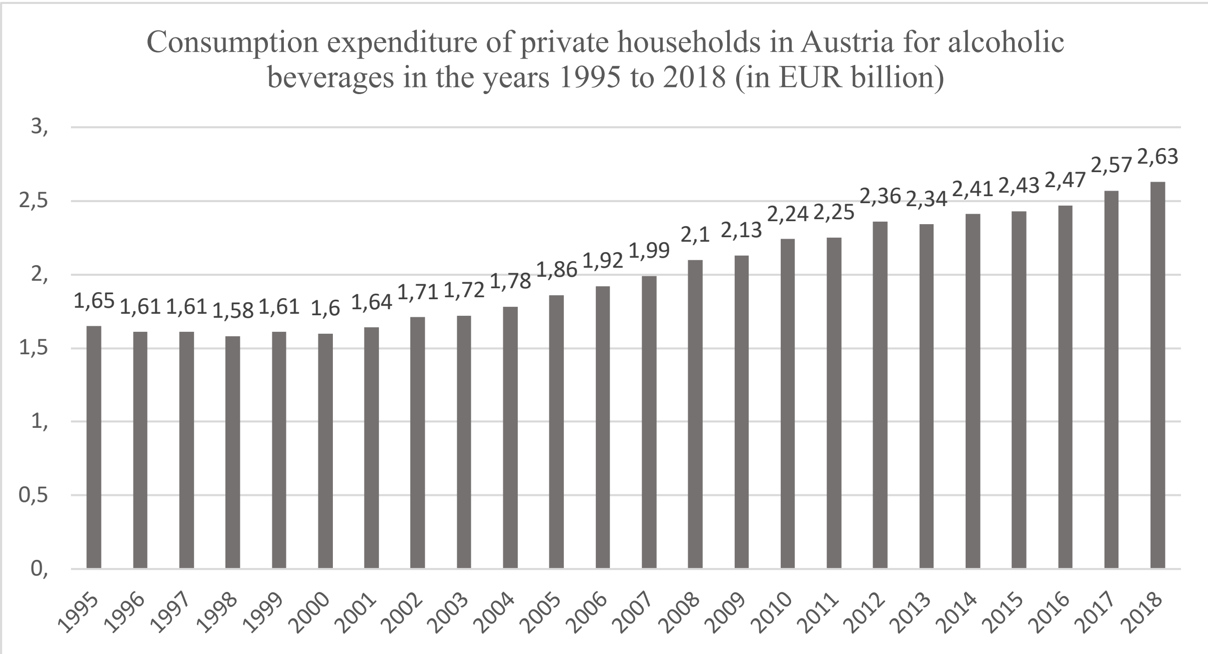

Figure 5: Private household consumption expenditure for alcoholic beverages in Austria in the years 1995 to 2018 in EUR billions.
Source: Statistik Austria, 2019a in Statista. Own representation.

The statistics in figure 5 show the consumption expenditure of private households in Austria for alcoholic beverages in the years 1995 to 2018, with approximately EUR 2.63 billion being spent on alcoholic beverages in 2018 (Statistik Austria, 2019a in Statista). In this case, too, a comparison to the German market shall be presented. In 2018, private households in Germany spent a total of around EUR 24.3 billion on alcoholic beverages (Statistisches Bundesamt, 2020).
The following figure shows the consumption of wine in Austria over the last 48 years.

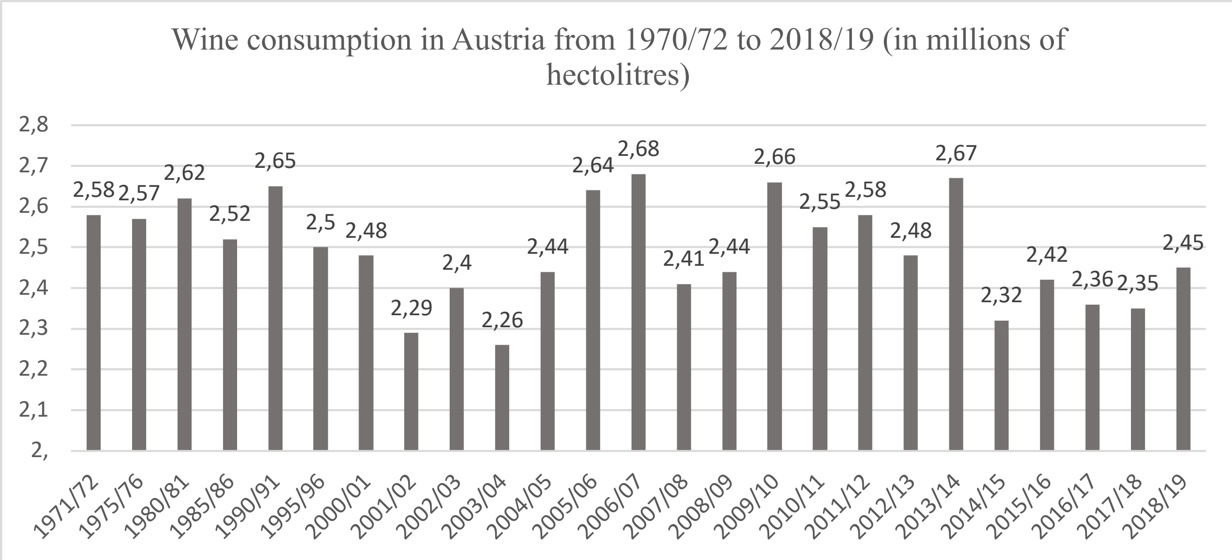

Figure 6: Consumption of wine in Austria in the years 1971/72 to 2018/19 (in millions of hectolitres). Source: Statistik Austria, 2020b in Statista. Own presentation.

In 2018/19, 245 million litres of wine were consumed in Austria. The majority of this quantity, 135 million litres, which corresponds to 55.7%, was consumed in restaurants or at events. Another 94.8 million (39%) were consumed in Austrian households (Schultz, 2020b; Statistik Austria, 2020b). A large part of this household quantity is allocated to purchases in the retail trade (76.7 million litres / 80.7%), a further part is supplied from farm-gate sales and other shopping outlets. 5%, which in 2018 corresponded to a quantity of approximately 12 million litres, were bought by tourists (Austria Wine, 2019c, p. 5).

Worldwide, a total of 244 million hectolitres of wine were consumed in 2019, 33 million hectolitres of which were consumed in the US market (Organisation internationale de la vigne et du vin, 2020, p.9).

Figure 7 shows the per capita consumption of wine in Austria in the years 1971/72 to 2018/19.

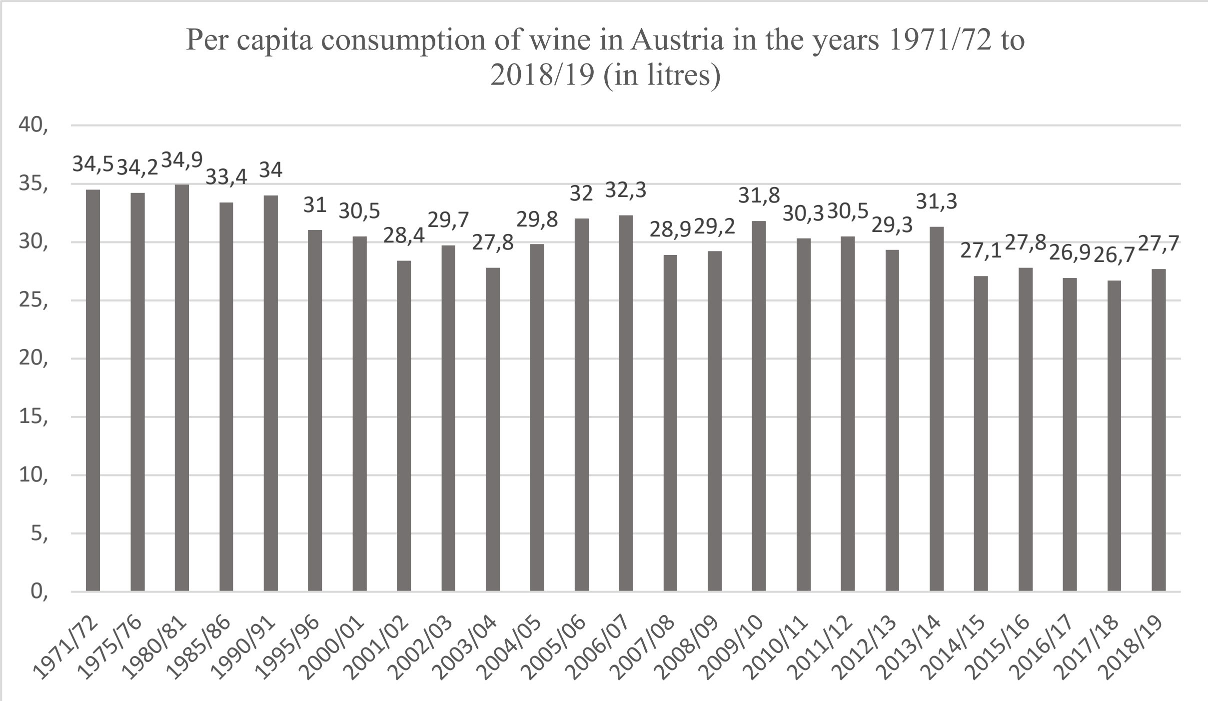

Figure 7: Per capita consumption of wine in Austria in the years 1971/72 to 2018/19.
Source: Statistik Austria, 2020c in Statista. Own representation.

In 2018/19, an average of about 27.7 litres of wine per capita were consumed in Austria, which ranked 6th in the world in terms of per capita consumption of wine (Roca, 2020). In comparison, the per capita consumption of beer was 104 litres (Österreich Wein, 2020b, p.48). When comparing these data with Germany, the following results can be stated: In 2018, Germans consumed 20.5 litres of wine and 102 litres of beer per capita (Suhr, 2019).

In the long term, wine consumption will decrease in Austria (Statistik Austria, 2020c). The gradual, wave-like decline is associated with the increased health awareness of the population, more traffic controls as well as changed consumption behaviour, an ageing society (older people drink less), or the immigration of people from countries without a wine tradition (Österreich Wein 2020b, p.48).

When it comes to home consumption of wines, this term can be explained as follows: Home consumption describes all wine purchases that are made from the farm, in the retail trade or in other outlets (e.g. specialised shops) and that are consumed in Austrian households. In 2019, 52.7 million litres of Austrian wine were consumed at home, which equals a decrease of 0.94% compared to the previous year. The sales revenues for the wines consumed at home amounted to EUR 265.4 million. Again, losses of 2.17% compared to 2018 were recorded.

In the context of home consumption, Austrian wine has a market share of 70.7% in terms of quantity and, as depicted in figure number 8 below, 78.75% in terms of value (Österreich Wein, 2020b, p.67). This fact proves that the Austrians are very proud and convinced of their own wines.

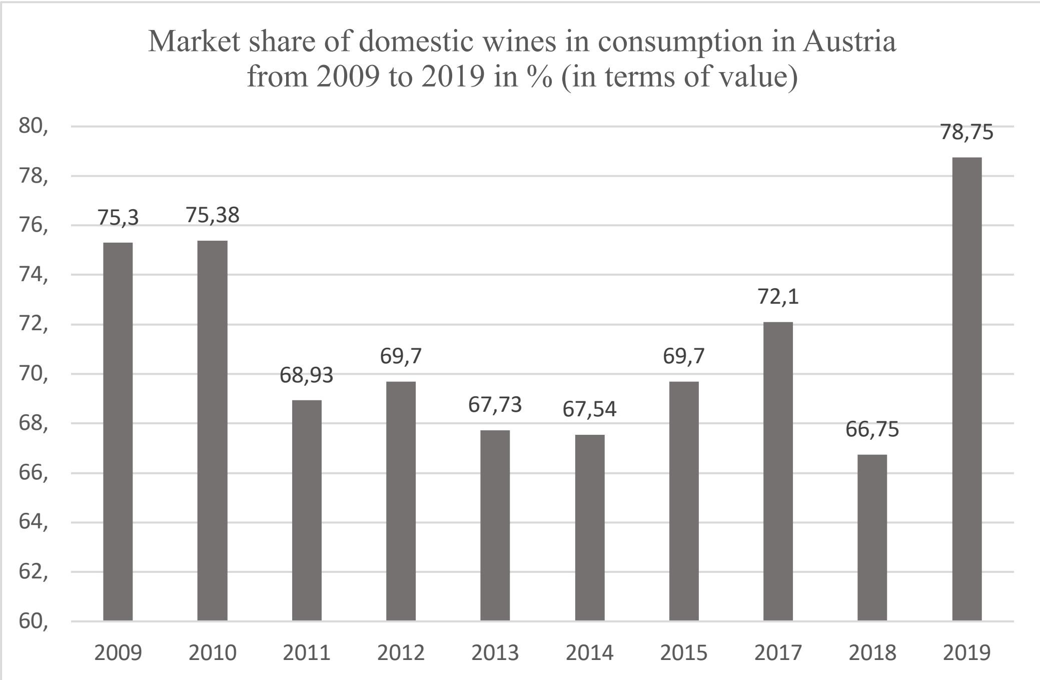

Figure 8: Market share of domestic wines in consumption in Austria from 2009 to 2019.
Source: Austrian Wine, 2020a in Statista. Own representation.

In 2018, the degree of self-sufficiency, i.e. the ratio of domestic production to total consumption, was around 101% for wine in Austria. This means that Austria produces enough wine to be able to cover domestic demand on its own (Schultz, in Statista, 2020a).

2.2.5 Distribution channels and sources of supply of Austrian wines

In the following chapter, distribution channels and sources of supply of Austrian wines are presented and described. This knowledge is essential for Austrian winegrowers in order to understand the status quo and, building on this, to recognise potential for sales.

Before focusing on the individual distribution channels, the following statements can be made on a higher level:

- Sales in gastronomy are decreasing in wine-growing regions and rural areas, but are increasing in the cities and tourist areas, where the average price is also increasing.

- While farm-gate sales continue to decline annually, wine sales in food retail and discounters are increasing continuously. The assortments in these channels are becoming wider and higher price ranges (EUR 5-10 and above) are growing strongly.
- New retail concepts with lifestyle components, such as wine bars and trendy restaurants, are on the rise.
- Internet trade for top wines and international icons is on the rise, while exclusive distributors are becoming increasingly rare.
- Top winegrowers have several distribution partners in the domestic market and in important export markets.
- The availability of top brands is increasing (Österreich Wein, 2019b, p. 20).

Figure 9 shows the distribution of sales channels for Austrian wine.

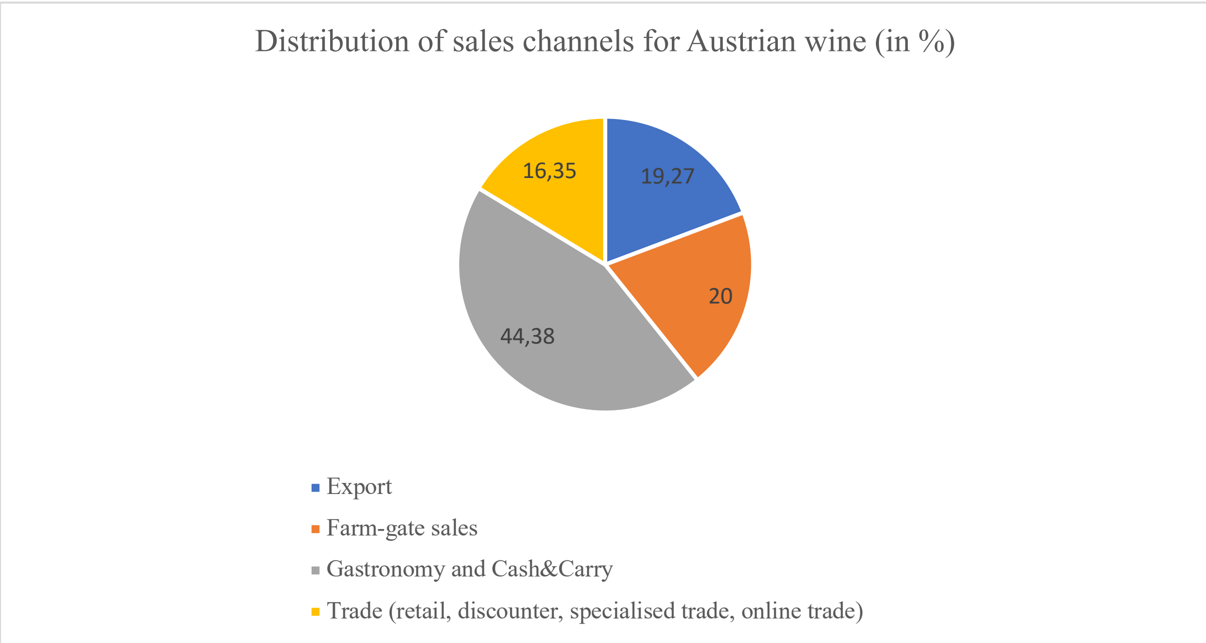

Figure 9: Distribution of sales Channels for Austrian wine in %.
Source: Own representation after Österreich Wein (2019c, p. 5 and 2020b, p. 70 and 90; Statistik Austria (2020a) and Landwirtschaftskammer Wien (2020).

Due to the lack of current data on the distribution channels of Austrian wines, figure 9 shows an assumption of distribution based on data provided by the Austrian Wine Marketing Board, Statistik Austria and Landwirtschaftskammer Wien (Österreich Wein, 2019c, p. 5 / 2020b, p. 70 and 90; Statistik Austria, 2020a and Landwirtschaftskammer Wien, 2020). The calculation was based on production volume, consumption volume and known consumption shares of Austrian wine of the year 2018. It is important to note that there is hardly any data available on discounters, online trade and specialised trade, and therefore, there is the possibility that the "trade" share may have to be adjusted upwards, as here year-related volume fluctuations must also be taken into account.

In the following, the distribution channels mentioned are presented and explained in order of their shares.

2.2.5.1 Gastronomy and C+C

Gastronomy plays an important role in the Austrian wine business both as a distribution channel and as an image builder. According to the market research company GfK, in 2018, a total of around 135 million litres (out of a total consumption of 242 million litres) were consumed in Austrian restaurants. In 2018, the market share of domestic wines was 90% in quantity and 88% in value in this very distribution channel (Österreich Wein, 2020b, p.54 and Österreich Wein, 2019c, p.5) with white wines dominating with 60% of quantity and 59% of value and red wines following with 39% in quantity and value. Since 2011, the market share of rosé wines has been in the 1% range in terms of both quantity and value (Österreich Wein, 2020b, p.51-64).

According to the Gastro-Data Institute, which collects figures on the wholesale trade in Austria (specifically: AGM, Kastner, Kiennast, Metro, Transgourmet and C+C Wedl; these businesses cover 90% of all C+C markets in Austria and collection turnovers as well as 65% of all delivery turnovers and have an estimated market share of 75-80%) via scanning figures of the wholesale trade and summarises them in the GastroPanel, the turnover in the Austrian gastronomy can be split as follows: 90-93% is purchased via farm-gate sales and specialised beverage retailers, 2% via distribution partners or retailers and 5-8% via wholesalers (Österreich Wein, 2020b, p.54). In terms of quantity, 89% of the wines are sold in the wholesale trade in price categories up to EUR 9.99. Wines in the EUR 6.00-9.99 price category (41.6%) generate the highest sales. In second to sixth place there are the price categories EUR 10.00-14.99 (17.9%), EUR 3.00-5.99 (14.4%), up to EUR 2.99 (13.8%), EUR 15-24.99 (7.8%) and over EUR 25 (4.6%). Average wholesale prices have been increasing in recent years. In 2019, the average price was EUR 5.11 per bottle. With over a fifth of the total sales and turnover, Grüner Veltliner is by far the most important domestic grape variety in the wholesale trade. The market share of this grape variety was around 24% in terms of both volume and value in 2019. In second place in terms of sales are wines made of the grape variety “Blauer Zweigelt”, followed by those made of “Welschriesling”. The 10 most important grape varieties account for 49% of all the wines in the wholesale trade in Austria when it comes to sold quantities and for nearly 60% in terms of value (Österreich Wein, 2020b, 58-64).

2.2.5.2 Farm-gate sales

In Austria, about 20% of the total wine production is sold from the farm (Landwirtschaftskammer Wien, 2020). Farm-gate sales are aimed at end consumers and achieve the highest price range per bottle but have been declining in Austria for years (Österreich Wein, 2019b, p.20).

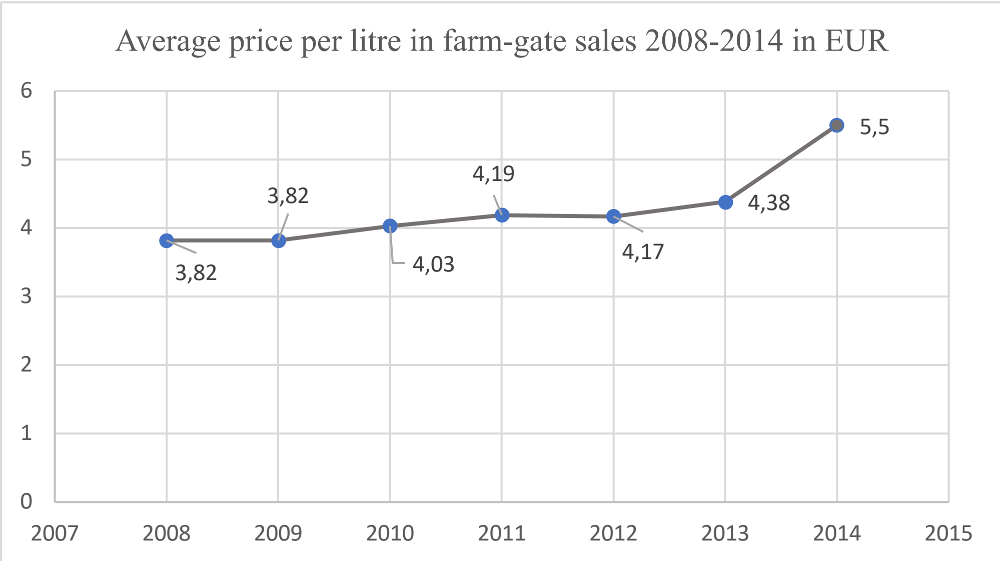

Figure 10: The development of the price of farm-gate sales from 2008 to 2014 (figures in EUR). Source: Österreich Wein, 2015. Own presentation.

For lack of more recent data, figure 10 shows the development of the average price per litre of wine in farm-gate sales from 2008 to 2014. This development shows the constant increase of the average price. In 2008, the average price per litre of wine purchased directly at a winery was EUR 3.82. In 2014, the average price amounted to EUR 5.50 (Österreich Wein, 2015, p.60). It is assumed that this development will continue steadily.

2.2.5.3 Export

Around 20% of the Austrian wine production is exported. First, it is essential to know, that – according to the Austrian Wine Marketing Board – exporting wines is a relevant sales channels for wineries producing more than 30,000 litres a year. This applies to 1,839 Austrian wineries in 2019 (Österreich Wein, 2020b, p. 43). As more and more wineries are producing larger quantities due to structural changes in Austrian enterprises, exports represent an increasingly important sales channel.

Figure 11 shows the export value of wines from Austria from 2002 to 2019.

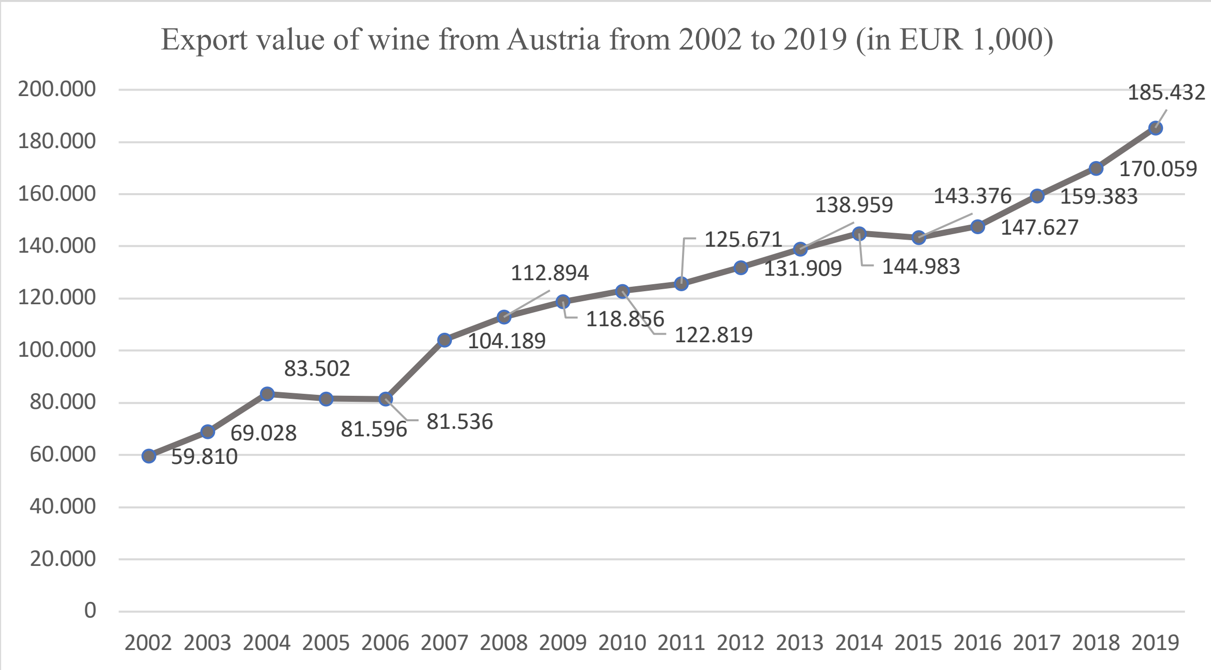

Figure 11: Export value of wine from Austria from 2002 to 2019 (figures in EUR 1,000).
Source: Austrian Wine, 2020c in Statista. Own representation.

As it can be seen in figure 11, wine exports from Austria increased by 9% in terms of value (EUR 185.4 million) in 2019 compared to the previous year. Sales volumes rose by 20.5% to 63.6 million litres. The average export price decreased from EUR 3.22 to EUR 2.92 compared to 2018, which is due to greater availability in the entry-level price segment (Österreich Wein, 2020b, p.89ff; Österreich Wein, 2020b, p.93). These figures confirm the increasing awareness and the good image of Austrian wines in foreign markets (Schultz, 2020b).

Figure 12 shows the most important export countries for Austrian wine.

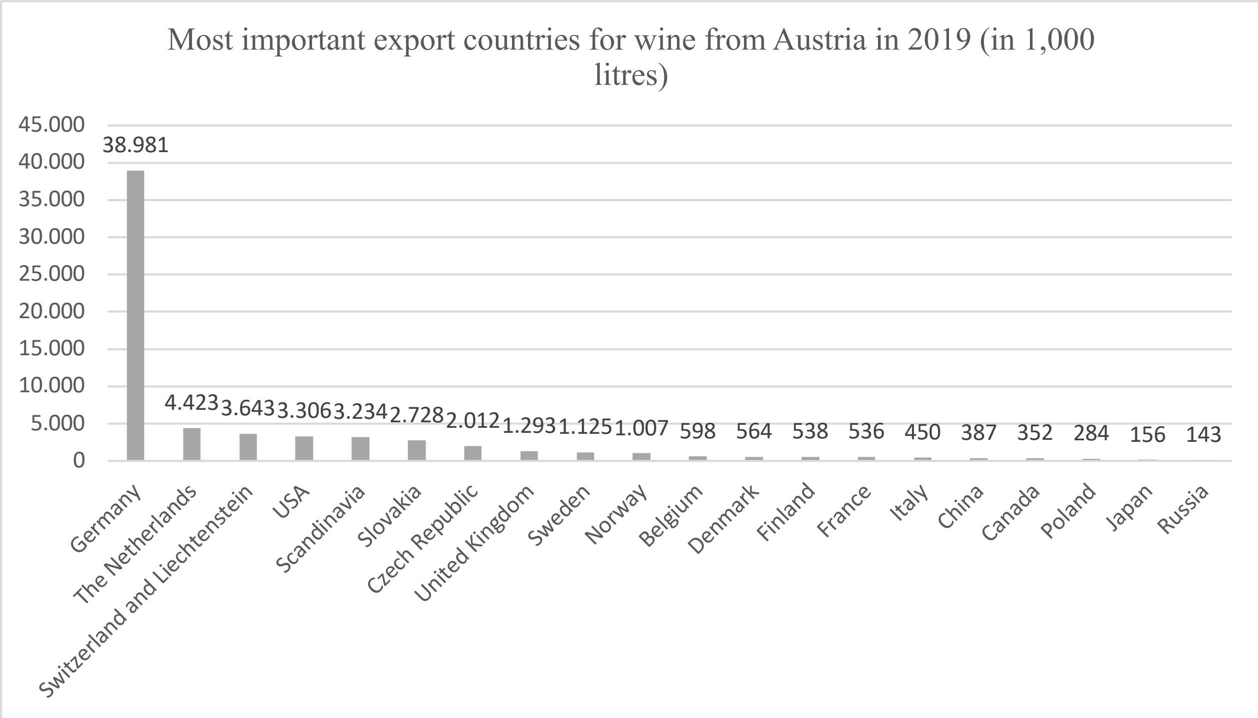

Figure 12: Most important export countries for wine from Austria in 2019 (figures in 1,000 litres). Source: Austrian Wine, 2020d in Statista. Own representation.

Figure 12 shows export countries for wines from Austria in 2019: In addition to the most important export countries Germany (with a plus of 3.9%), Switzerland (with a plus of 0.9%) and the United Stated of America (with a plus of 14.8%), the Netherlands (with an increase by 32.5%) and all Scandinavian countries, with the exception of Norway, also showed a positive sales trend. In the Far East, the export market “China” developed very well (+86.8 %) and sales figures to Japan rose again (+12.6 %), after stagnating years (Österreich Wein, 2020b, p.89ff).

The number of export countries also showed an upward trend in 2019: Austrian wines were exported to 102 countries in 2019, whereas in 2009, the number of countries Austrian wines were sold to was 64 (Österreich Wein, 2020b, p.89ff).

The export share of bottled wines in total exports was 78% of the quantity and 94% of the value (Österreich Wein, 2020b, p.89ff.), which indicates a higher demand for Austrian quality wine than bulk wine.

2.2.5.4 Retail

The following lines are dedicated to food retail trade, discounter, specialised trade and online sales channels.

Food retail trade

Over the past 20 years, the retail trade has developed into the most important distribution channel for home consumption. The wine assortment in supermarkets has been greatly expanded and especially the offer in higher price segments (from EUR 5 per bottle) has been greatly increased. While 20 years ago, many wine customers bought wine from a few winegrowers on their farms, wine is now mainly bought at supermarkets for specific occasions and needs (Österreich Wein, 2020b, p.70).

Sales in the retail trade have been relatively stable over the last five years, but in terms of turnover, significant profits were achieved. 2019 was a small exception in this respect: there was a 1.1% increase in sales volumes, but turnover declined slightly (-0.8%). In 2019, the market share of domestic wines was 62.6% in terms of sales volume (this corresponds to an increase by 8.6% compared to 2018) and 73.1% in terms of value (this is equivalent to an increase by 3% compared to 2018. In 2019, 48.634 million litres of domestic wine were sold at a total value of EUR 261,728 in food retailing. This corresponds to about 20% of annual production, and the trend is rising. In comparison, the share of the volume sold to retailers in 2018 was 16.61% of annual production). The market share of Austrian wines was 62.6% in terms of sales and 73.1% in terms of turnover (Österreich Wein, 2020b, p.70f).

Discounter

Due to a lack of official statistical data on Austrian wines sold at discounters, a study on this topic was analysed. According to this research work by the University of Applied Sciences IMC Krems, which dealt with the discounters Hofer, Lidl and Penny Markt present on the Austrian market, major changes in the wine assortment offered could be noticed in this sector – similar to the retail trade. In their 12-year study (2006 to 2018), the authors show the changes in the wine assortment of these discounters in terms of supply, origin and price. In general, it can be said that the wine assortments of Austria's leading discounters show a significant increase in terms of supply and variety from 2006 to 2018 (the number of wines sold at the discounters has increased by more than 100% from 113 to 262 different wines). Likewise, all the discounters recorded a trend towards Austrian white wines as well as a significant increase in the selection of different producer countries. Also, the range of grape varieties offered by all three chains expanded very strongly: while in 2006, 23 different grape varieties were offered, in 2018, already 33 were offered. The price development speaks for itself. In general, increases in average prices have been observed. While in 2006, the average price for more than 50% of the wines at the three discounters examined was still under EUR 3 on sale, in 2018 more than 50% of the wines cost already over EUR 3. On average, a bottle of wine was EUR 2.70 at a discount store in 2006 and EUR 4,26 in 2018. This corresponds to a rise in the average price by around 58%. The authors attribute this development more to the expansion of the overall range to include higher-priced wines than to the general increase in prices. New wine styles have also found their way to the discounters: Orange wines have arrived in the high price segment and niche products such as Schilcher or Gemischter Satz are also available on the shelves. In summary, this means that the wine landscape at Austrian discounters has developed in the direction of a larger assortment, more variety and a wider price range, and Austrian wines have also recorded a strong increase in this area (Pöchlinger & Stöckl, 2019).

Specialised trade

Information on the specialised wine trade in Austria is rare. Until a few years ago, sales in this very sector were greatly overestimated and were estimated at 27% of household market sales. This figure was corrected to 8.1% of home consumption by using a more accurate survey method (Österreich Wein, 2020b, p. 68). In general, however, new concepts are enjoying great popularity in the specialised wine trade. Thus, lifestyle components are increasingly being incorporated and link the specialist trade with other areas, such as gastronomy (Österreich Wein, 2020b, p. 106).

Online trade

Gross annual sales in Austrian Internet retailing amounted to approximately EUR 3.8 billion in 2018, while in 2006, e-commerce turnover in Austria was still at EUR 700 million. This corresponds to a growth of 442% (Handelsverband Österreich, 2019), which is proof of the current success of this distribution channel. In the wine industry as well, online trading has made its entrance. Figure 13 shows the Austrian online wine merchants with the best test results in the areas of “range of offers”, “prices and conditions”, “transparency and convenience”, “customer service” and “delivery service” in 2019.

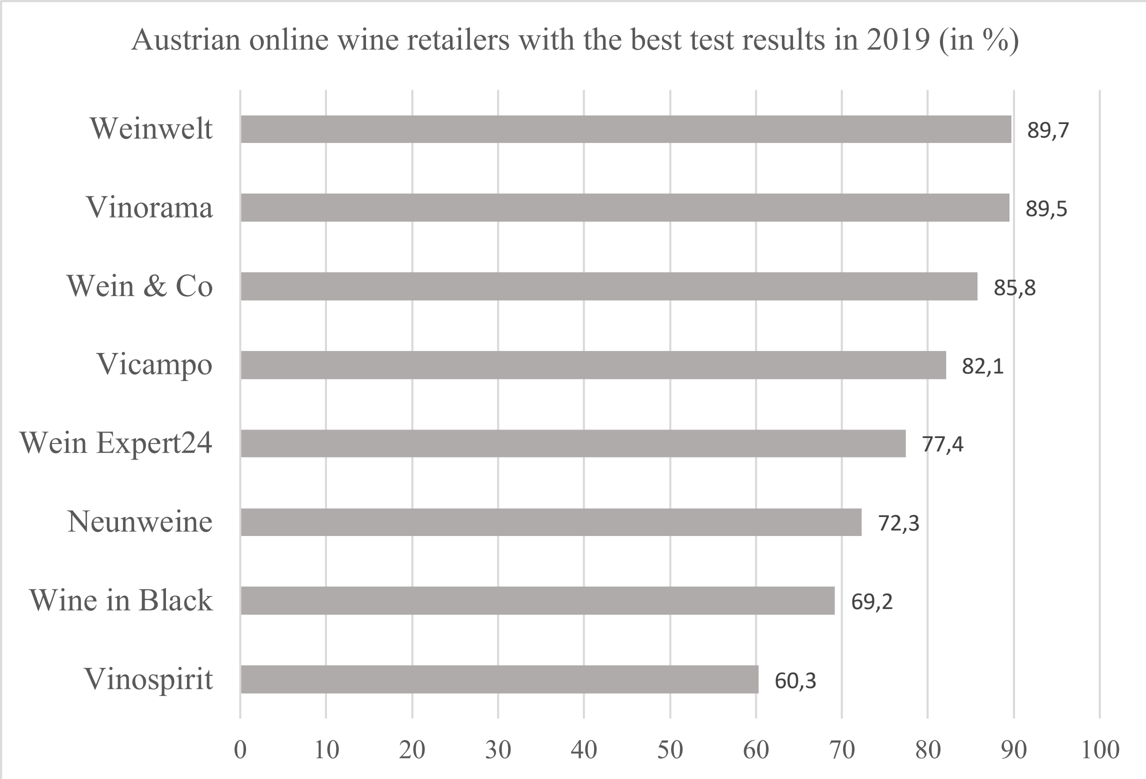

Figure 13: Austrian online wine retailers with the best test results in 2019 (figures in %).
Source: ÖGVS, 2019 in Statista. Own representation.

As can be seen in figure 13, Weinwelt.at, which is the online retailer of the stationary chain "Interspar", took first place with a target achievement rate of 89.7%, followed by Vinorama.at, which is the online shop of the stationary specialised shop "Morandell", and Weinco.at, which is the online extension of the stationary wine trade chain Wein & Co, in second and third place (ÖGVS, 2019 in Statista).

2.2.6 Economic factor "Austrian wine"

The economic importance of the wine sector is often not even known to domestic winegrowers. In order to shed some light on the economic factor "Austrian wine", the following lines will focus on this aspect. It is essential that the protagonists of the Austrian wine industry are aware of its importance.

The wine industry is of considerable importance for the Austrian economy. In order to ascertain the often underestimated contribution of this sector to the Austrian economy as a whole, the Austrian Wine Marketing Board commissioned a scientific study from the Institute for Advanced Studies (IHS) to estimate and quantify the economic importance of the wine industry for Austria in terms of added value, jobs and tax revenues. The results of the study are as follows: In 2014, wine in Austria generated a gross value added of about EUR 3.6 billion. This corresponds to 1.23% of the total Austrian added value. Apart from wine production in Austria, the strongest positive effects are generated in the areas of trade, hotels and restaurants and tourism. As a result, 40% of the added value and 35% of the employment in the wine-related economy is located outside the four wine producing provinces of Lower Austria, Burgenland, Styria and Vienna. In total, more than 75,000 jobs were secured by the wine industry in 2014, which represented 1.6% of the Austrian workforce.

More than EUR one billion in consolidated taxes and duties flowed back to the public sector. The main beneficiaries were the federal government with EUR 528.7 million, followed by the social security funds with EUR 354.7 million, the provinces with EUR 170.6 million and the municipalities with EUR 128.1 million. However, other social security contributions (EUR 54.3 million for the Family Burden Equalisation Fund, the Disaster Fund and the financing of hospitals) are also included in the accounts, as are other taxes on production.

Due to the lack of significant comparative values from the reference year 2004, the study is only of limited value for an analysis of the development of the wine industry in the last decade. However, a further result that can be clearly documented is that average earnings in agricultural wine production sector have risen significantly, while the share of subsidies in added value has declined significantly. This is certainly due to the positive development of quality-oriented farms (Schnabl, Lappöhn & Pohl 2016).

2.3 Benchmarks for the wine industry

The Geisenheim University of Applied Sciences is considered a luminary in the wine sector. Its research has a decisive influence on the European wine industry and its company analysis has been providing benchmarks for the German wine industry since 1993. For this purpose, the annual financial statements of an average of about 400 wineries per year from the majority of the German wine-growing regions are evaluated and processed anonymously. The sample consists of companies of different sizes and marketing orientations. In the 2019 report published by the Institute of Wine and Beverage Economics at the University of Applied Sciences Geisenheim on the last Geisenheim company analysis, cross-references to the Austrian wine market were also drawn.

The quintessence of the study can be summarized as follows:

- The production of good wine is no longer sufficient to run a winery successfully. Profitability plays an important role.
- In the past decades, the importance of distribution channels has changed. Farm-gate marketing has declined. Sales intermediaries, such as wholesalers and specialised retailers as well as the gastronomy sector, are becoming important partners.
- Farms that are not able to operate economically and thus ensure sufficient remuneration for the entrepreneur have difficulties in handing over the business to a successor.
- Climate change and the associated investments demand economic efficiency of wineries.
- The larger a winery and the higher the proportion of bottled wine marketed, the more economically successful the business.
- Over the last few years, a steady growth in the yield areas per winery has been observed, while the total number of wineries has been declining.
- Mechanisation unfolds its advantages most strongly on large areas.
- Due to their strength in direct marketing, the smallest farms can achieve the highest turnover per hectare, most recently EUR 44.258/ha. In comparison, this was EUR 32.271/ha for wineries with a size from 5 to 10 ha. This medium size group is often too large for exclusive direct marketing and on the other hand too small for profitable marketing via other sales channels. Despite these highest sales per hectare, the smallest wineries are unable to compensate for their major disadvantages in the expense structure.
- Wineries with vineyards of less than 5 ha do not manage to adequately remunerate their family workers on average for the number of farms and years. They exploit themselves by working below the comparative wage. The continued existence of these farms is only possible as long as the owners are satisfied with a comparatively low income or compensate for the losses through surpluses in other branches of the business, such as gastronomy (Strub & Loose in Der Winzer, 2019b).

In terms of economic policy, it can be concluded that larger farms are significantly more successful economically. From this point of view, promoting structural change – away from many small farms and towards fewer, but larger farms – seems to make sense. The effects described for the German wine market broadly apply for the Austrian wine market as well (Strub & Loose in Der Winzer, 2019b).

The findings of this study are of considerable help to Austrian winegrowers seeking to evaluate and reorient parts or all of their operations, as those responsible can use this background knowledge to make informed decisions.

3 Conceptual frame of marketing communication tools

In order to draw up a marketing communication model for Austrian wineries, which helps them become more successful in their business area, the status quo of the application of marketing communication tools in general in Austria was surveyed and analysed through literature and pre-studies. Before their presentation, different definitions of marketing communication tools as well as possibilities of grouping them are described. The all-encompassing bracket of the communication tools presented below is integrated marketing communication. For this reason, it is defined in a first step.

Integrated marketing communication

One possible definition of integrated marketing communication is the coordination of all market communication measures in terms of content and form in order to unify and strengthen the impressions created by the communication. The effects produced by the means of communication should support each other (Esch, 2018a). It can produce stronger message consistency and create greater sales impact through increased brand equity (Rao, 2019).

According to Belch and Belch (2009, p. 11) and du Plessis (2005, p. 10), the concept of integrated marketing communication recognises the merits of different marketing communication disciplines, and the value of using appropriate combinations of these disciplines to maximise the effect of the organisation's communications that customers encounter through clarity and consistency.

One of the major benefits of integrated marketing communication is that the story of the brand can be clearly and effectively communicated across several channels to create brand awareness and that companies can observe the performance of their communication tactics as a whole instead of as fragmented pieces. Not to be underestimated is the fact that it has the power of creating a competitive advantage for companies looking to increase their sales and profits. This is especially useful for small- or medium-sized companies with limited human and financial resources and marketing budgets. The organisation "simultaneously consolidates its image, develops a dialogue, and nurtures its relationship with customers throughout the exchange. Integrated marketing communication can be instrumental in creating a seamless purchasing experience that spurs customers to become loyal, lifelong customers" (Lumen Candela, 2020).

Although the intentions of integrated marketing communication began as a tool to organise outgoing communication from an organisation it has come to apply to the co-ordination of incoming communication as well (Schultz & Schultz, 2003, p. 15). In this way, integrated marketing communication has evolved into an interactive concept encompassing communication between customers and the organisation. This development is largely a result of advances in information and communication technology (Kotler et. al., 2010, p. 799).

According to Schultz and Schultz (2003, p.12f) the three main forces behind integrated marketing communication are:

- advances in technology affecting all operations of the organisation
- greater emphasis on brands for competitive differentiation and
- effects of globalisation across geographic boundaries.

These forces have prompted better integration of other activities within an organisation besides marketing communication. According to Schultz and Schultz (2003, p. 23) for integrated marketing communication to be effective it must be embraced across the entire organisation, becoming part of their operational behaviour.

Definitions of marketing communication tools

Due to the scope of the topic, only selected marketing communication tools will be described, as the complexity of all tools would clearly go beyond the scope of this thesis.

Marketing communication tools are a set of diversified programs designated to communicate with the target audience effectively. Utilising marketing communication tools that are best suited for specific marketing campaigns in order to reach the desired audience at various stages of the marketing funnel and across different channels is crucial. Deciding how best to use these tools to effectively reach audiences is the marketing communication strategy, which is essential to convey the messages (Bhasin, 2019; Marcom Central, 2020).

Grouping possibilities of marketing communication tools

A traditional classification of marketing communication tools was made by Philip Kotler (Kotler et.al, 2010 p.791). He grouped the different communication disciplines as follows:

- Advertising
- Personal selling
- Sales Promotion
- Public Relations
- Direct response marketing

The selected tools advertising and sales promotion are described in detail below.

Another approach is to group the communication tools into:

- Above-the-line – advertising activities that are largely untargeted and focus on building a brand,
- Below-the-line – activities directed to specific target groups and focus on conversions and
- Through-the-line tools – the integration of both above-the-line and below-the-line tools.

The selection of communication tools described below is classified and described according to the latter approach.

It is assumed that those enterprises in the Austrian wine industry that aim to increase their success have subjected their business to a thorough analysis of the business figures (sales, turnover, profit/loss) and have already analysed the enterprise with regard to basic marketing parameters such as product, price and distribution channels. These companies should, through the communication tools described in the following chapter, gain further knowledge in this area in order to make informed decisions.

In the following chapter, the tools described are analysed in terms of their use in the (Austrian) wine industry.

3.1 Above-the-line tools

In a first step, classic advertising measures are presented.
Above-the-line measures, or "advertising in the classical sense", are media-related communication measures in the sense of the classical instruments of communication. The two terms "above-the-line measures" and "advertising in the classical sense" are therefore used

synonymously. Kroeber-Riel (1988, p.29) describes them as "influencing behaviour-relevant attitudes by using specific forms of communication that are spread via communication media". These include print ads, TV, cinema and radio advertising, as well as OOH advertising (out-of-home or outdoor advertising) (Bak, 2019, p.15) and are used to address target groups in an impersonal and scattered manner. A characteristic feature of this group of advertising media is that it can be planned and is aimed at a broad target group (Esch, 2018).

In the marketing mix, advertising is one of the instruments of communication policy and it is the most conspicuous of the communication instruments due to the cost-intensive use (Schulz, 2018). Fletcher (2010, p. 2) provides a further definition: he states that advertising is a paid form of communication that aims to inform and convince. According to this definition, the relatively new form of online advertising measures also belongs to the group of above-the-line measures. Their importance in the through-the-line sector is discussed in chapter 3.3.

In the following, important channels of above-the-line measures that were used in Austria in 2018 and 2019 are presented and their characteristics are shown.

It is important to mention that only a selection of above-the-line tools is presented in the following, as the depiction of the totality would go beyond the scope of this work.

In the next chapter, these very advertising opportunities will be presented in the field of the wine industry.

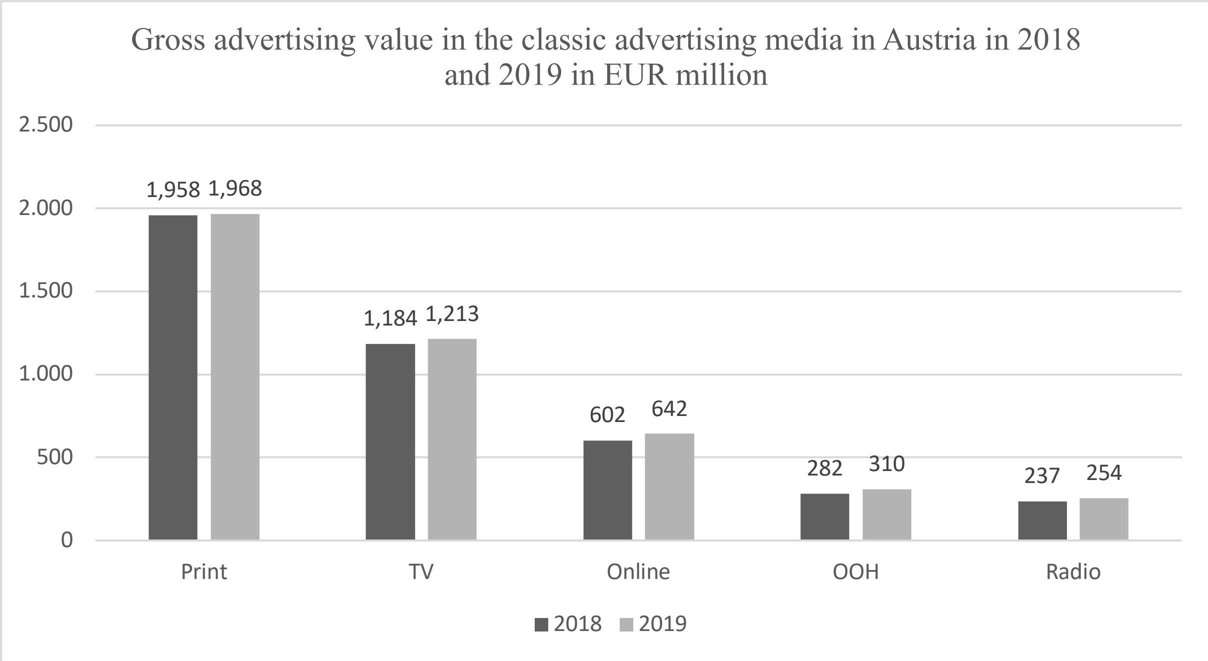

Figure 14: Gross value added in the classic advertising media in Austria in 2018 and 2019 (figures in EUR million). Source: FOCUS Marketing Research, 2020a in Statista. Own presentation.

As it can be seen in figure 14, the gross value of "classic" advertising (above-the-line measures) amounted to a total of around EUR 4.4 billion. This represents an increase by 2.9 % compared to the previous year. The lion's share of this is represented by print advertising in 2019 with almost EUR 2 billion, followed by TV with EUR 1.2 billion. Online advertising follows in third place by a wide margin (EUR 0.6 billion), followed by outdoor advertising in fourth place (with EUR 0.3 billion). Radio advertising also remains popular in 2019. A total of EUR 0.25 billion was invested here (FOCUS Marketing Research, 2020a).

3.1.1 Print advertising

Print advertising is understood to be a printed form of advertising, which is placed in the form of advertisements (ads) in general interest magazines, trade journals and daily newspapers. When choosing the print medium, the assumed involvement of the readers in the product or service to be advertised has priority. Advertisements should make people aware of the product or service, create a positive emotional atmosphere and arouse interest. However, detailed information required for a purchase cannot be comprehensively conveyed by print ads (Bak, 2019, p.20f and Fuchs & Unger, 2014, p.195f.).

Figure 15 shows the gross expenditure on print advertising in Austria in the years 2011 to 2019.

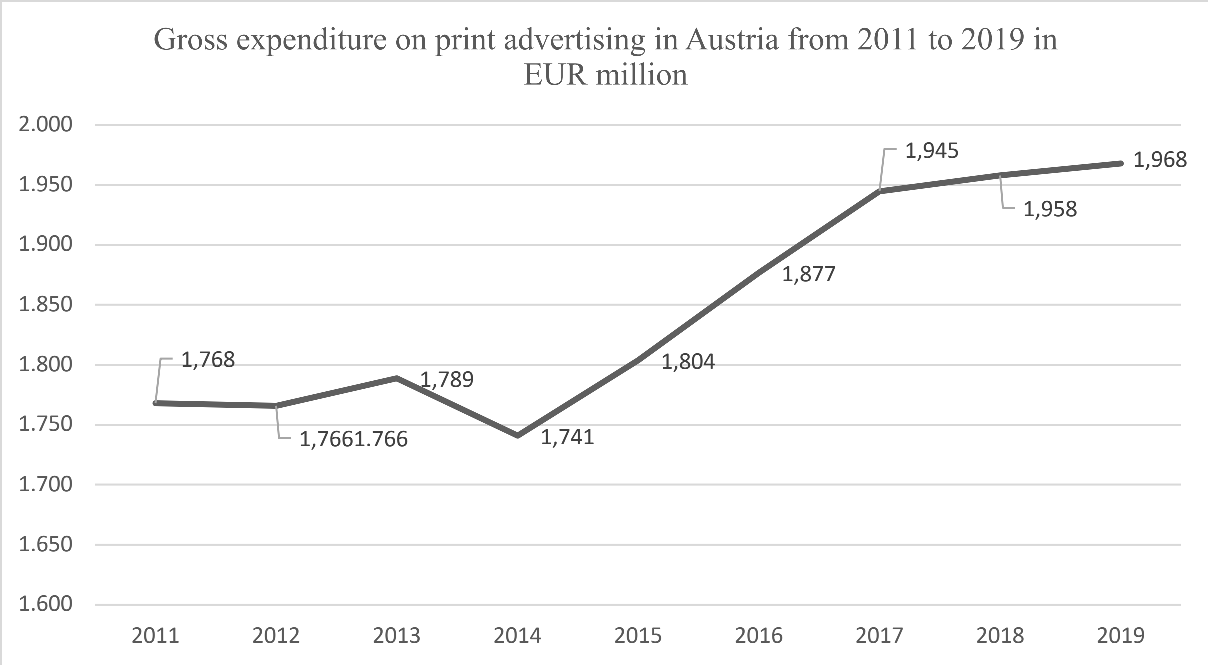

Figure 15: Gross expenditure on print advertising in Austria from 2011 to 2019 (figures in EUR million).
Source: FOCUS Marketing Research, 2020b in Statista. Own representation.

As it can be seen in figure 15, gross expenditure on print advertising in Austria rose almost steadily from 2011 to 2019 (with the exception of a slump in 2012 and 2014), reaching EUR 1,968 million in 2019. Taken these facts, it can be concluded that print advertising is still a very popular form of advertising in 2019 (FOCUS Marketing Research, 2020b). A statement that also corresponds with figure 14.

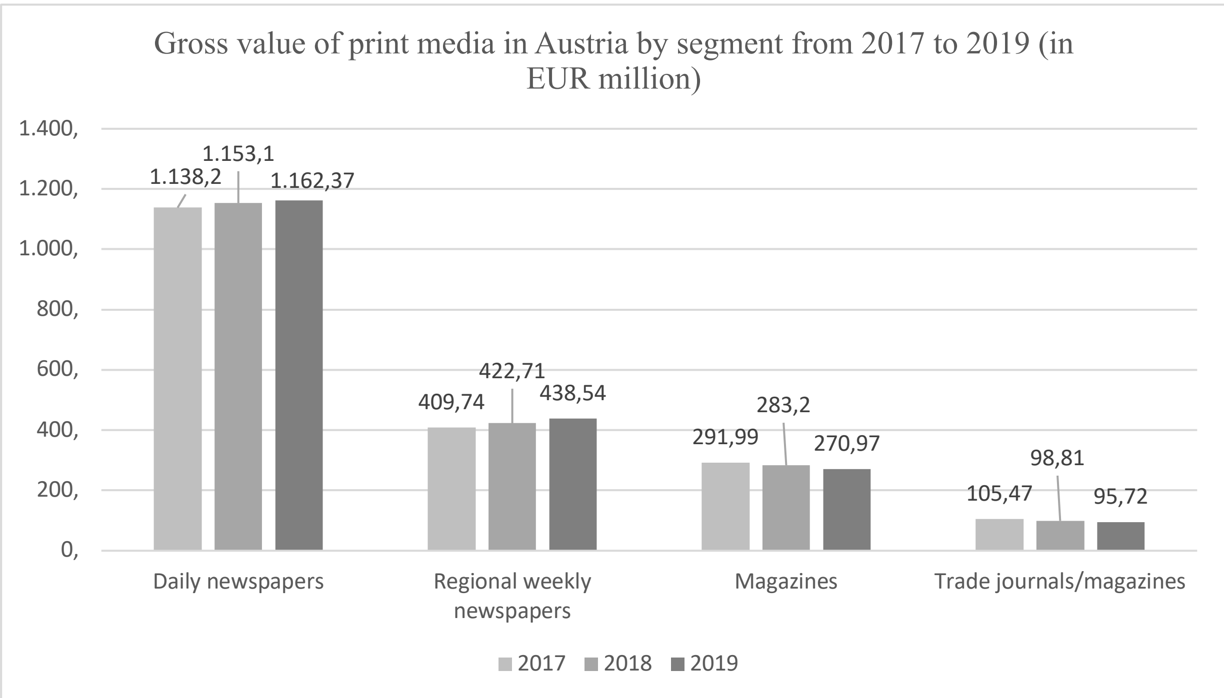

Figure 16: Gross value of print media in Austria by segment from 2017 to 2019 (figures in EUR million(.
Source: FOCUS Marketing Research, 2020h in Statista. Own representation.

Looking at different segments of print media (figure 16), it can be seen that the gross value added in the area of “magazines” and also "trade journals" decreased by 7.20% in the case of magazines and by 9.24% in the case of trade journals from 2017 to 2019 (FOCUS Marketing Research, 2020h). As all wine-related print media belong to either the category “magazines” or "trade journals", this information is essential for the present research.

3.1.2 TV advertising

In 2019, TV advertising continues to be a leading medium, primarily used for image advertising, especially when it comes to linking a brand or a product with the most positive associations possible (Bak, 2019, p.21). It allows details and incidental matters to be focused on and has the potential to convey visual and acoustic sympathy and atmosphere (Fuchs & Unger, 2014, p.206ff).

Figure 17 shows the gross expenditure on TV advertising in Austria from 2011 to 2019.

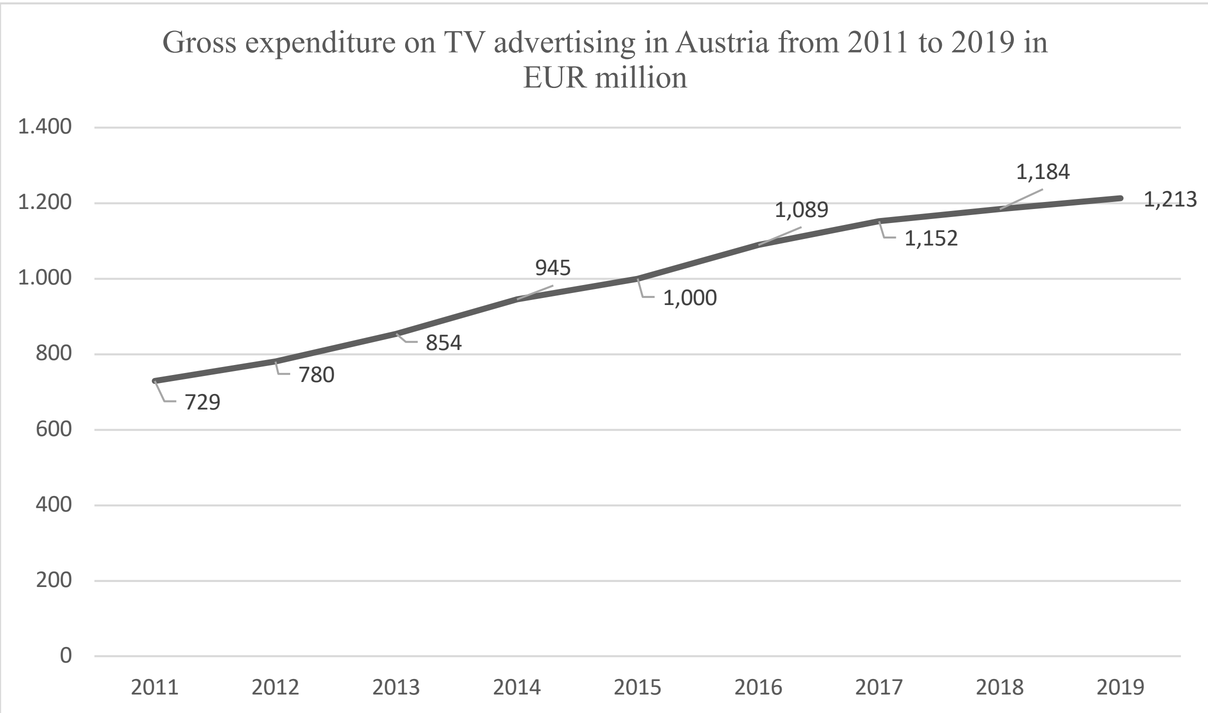

Figure 17: Gross expenditure on TV advertising in Austria from 2011 to 2019 (figures in EUR million).
Source: FOCUS Marketing Research, 2020d in Statista 2020d. Own representation.

As depicted in figure 17, approximately EUR 1.21 billion were invested in television advertising in Austria in 2019 (FOCUS Marketing Research, 2020d). This represents an increase by 2.4 % compared to the previous year.

According to own research[1], it currently makes sense to broadcast on Austrian television depending on the channel, broadcasting time, format and length from a minimum budget of EUR 20,000. However, this is the lowest limit, and it is questionable whether the desired effect can be achieved with this budget.

3.1.3 Out-of-home advertising and ambient marketing

The following lines are dedicated to out-of-home advertising and to the new and innovative tool of ambient marketing.

Out-of-home advertising

In general, out-of-home (OOH) advertising, or outdoor advertising, refers to advertising that does not take place in enclosed spaces. The aim of this special form of advertising is either to encourage the customer to behave in a certain way, to inform him about offers and possibilities or to confront him with the advertising message in very different contexts (Bak, 2019, p.15). Accordingly, OOH advertising is a very broadly defined category that combines many different forms of advertising. All forms have one major advantage in common: people are reached where they work, play, shop or walk. Forms of outdoor advertising are posters, city lights or actions at the point of sale, to name but a few (Kotler & Keller, 2006, p.577f).

Figure 18 describes the gross expenditure on outdoor advertising in Austria from 2000 to 2019.

[1] In the summer of 2020, the author solicited offers from the Austrian television stations ORF, ATV and Puls4.

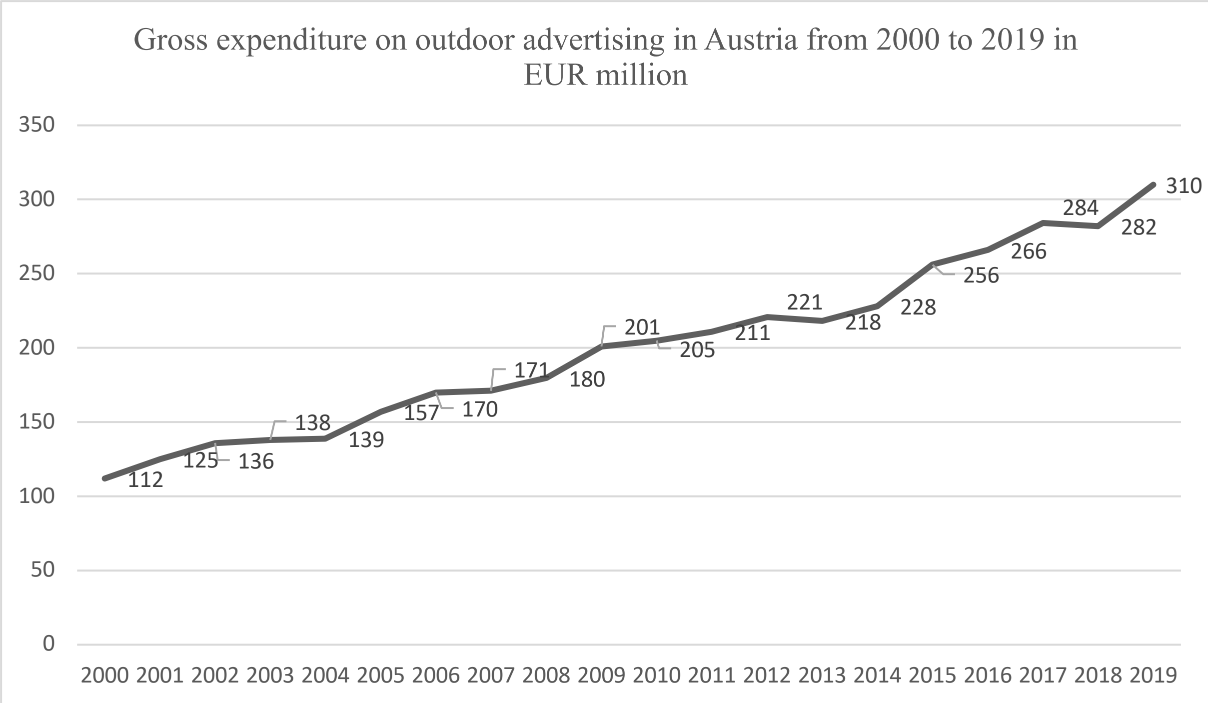

Figure 18: Gross expenditure on outdoor advertising in Austria from 2000 to 2019 (figures in EUR million). Source: FOCUS Marketing Research (Media Focus Research) 2020f in Statista. Own presentation.

As shown in figure 18, EUR 310 million were invested in outdoor advertising in Austria in 2019. This represents an increase by 9.7% compared to the previous year. Remarkable with regard to gross expenditure on outdoor advertising is the almost constant increase from EUR 112 million in 2000 to EUR 310 million in 2019 (FOCUS Marketing Research, 2020f).

According to own research[2], an out-of-home poster campaign with an average duration of two weeks costs about EUR 350 per poster.

Digital out-of-home advertising is the extension of analogue out-of-home advertising options into the digital world. It includes outdoor signage, digital billboards, and screen networks, for example, in shopping centres or rail stations. Illuminated posters, so-called City Light Posters, are of particular importance, as they are highly effective in all seasons and are particularly suitable for retail due to their locations in highly frequented places (Fuchs & Unger, 2014, p.216).

[2] In the summer of 2020, the author solicited offers from the Austrian companies Gewista and Epamedia, which specialise in OOH advertising.

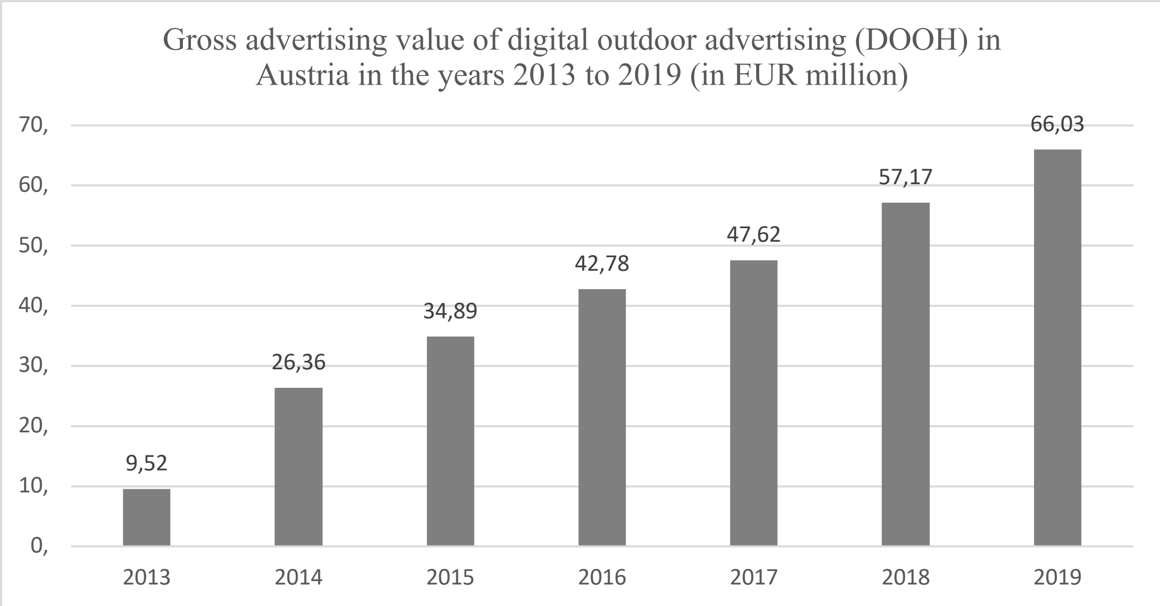

Figure 19: Gross value of digital outdoor advertising (DOOH) in Austria until 2019 (figures in EUR million). Source: FOCUS Marketing Research (Media Focus Research) 2020g in Statista. Own presentation.

Figure 19 describes the development of the gross value of digital outdoor advertising from 2013 to 2019. In 2019, the gross value of digital outdoor advertising (DOOH) in Austria amounted to EUR 66.03 million. Thus, the advertising value in this segment has increased almost sevenfold compared to 2013.

Own research[3] shows that digital out-of-home campaigns with a duration of two weeks can be placed from EUR 210 per screen.

Ambient marketing

The term "ambient marketing" describes innovative, plannable media formats that are placed and perceived in the direct living environment of the target group. As a result, the measures are not perceived as disruptive, but rather as likeable and original (Schneck, 2015). Another definition is given by Hutter and Hoffmann (2011, p. 121-135): they define ambient marketing as "placing advertising in locations where it is not expected, involving the environment in the advertising measure".

The focus of ambient marketing is primarily on young target groups aged 16 to 35, which makes ambient media particularly well suited for building young and experience-oriented brands. In

[3] In the summer of 2020, the author obtained offers from the Austrian companies Gewista and Epamedia, which sell space for DOOH advertising.

contrast to guerrilla marketing, ambient marketing campaigns can be planned, measured and repeated (Schneck, 2015).

The placement of media in the direct living environment of the target group can be carried out in a wide variety of places: Trend and scene gastronomy (e.g. bar, club, cinema, café), leisure facilities (e.g. fitness centre, sports studio, swimming pool, wellness facility), out of home (e.g. street, shopping arcade, train station, airport), point of sale (e.g. supermarket, bakery, video store, petrol station), point of education (e.g. kindergarten, school, university) or at home (e.g. pizza box) (Hutter & Hoffmann, 2011, p. 121-135; Schneck, 2015).

According to the Focus Advertising Report 2020 (Focus Marketing Research, 2020g), the gross value of ambient marketing in Austria increased by 2.6% to EUR 7.16 million from 2018 to 2019.

3.1.4 Radio advertising

Radio advertising is the placement of radio spots in or between broadcasts of public or private radio stations. According to Kotler and Keller (2006, p.572f.), the great advantage of this convincing medium, which is particularly effective in the morning hours, lies in its great flexibility. It is mainly suitable for advertising messages that are very clear, uncomplicated and can be well presented acoustically (Schweiger & Schrattenecker, 2009).

Figure 20 shows the gross expenditure on radio advertising in Austria from 2011 to 2019.

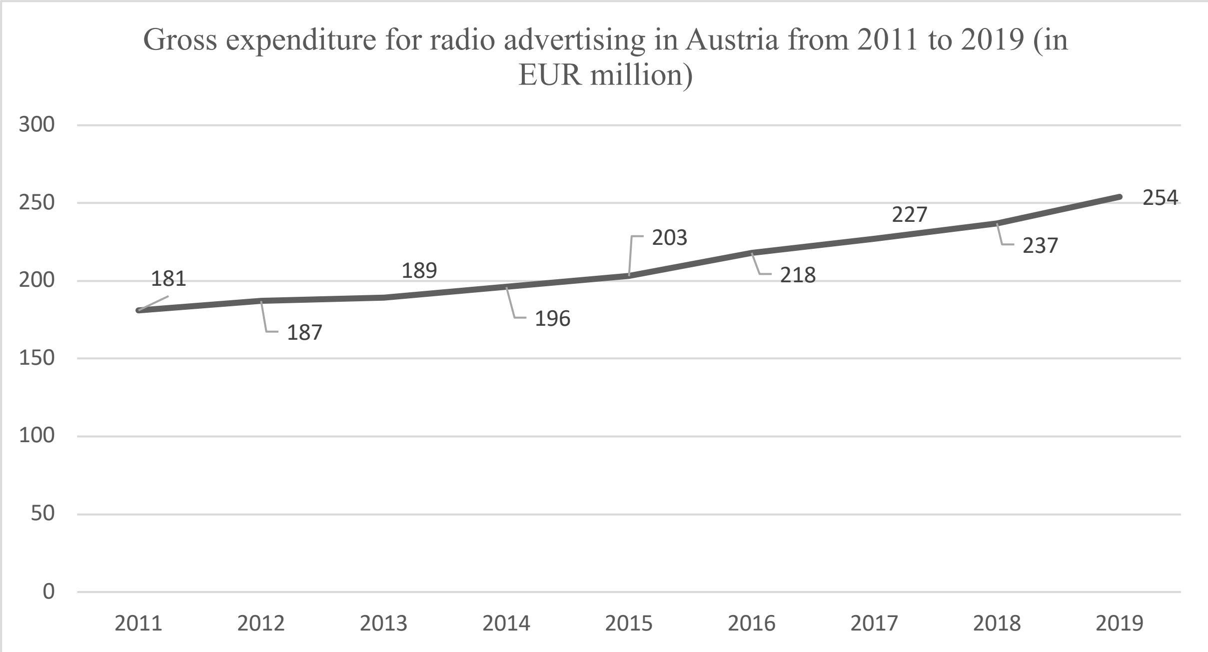

Figure 20: Gross expenditure on radio advertising in Austria from 2011 to 2019 (figures in EUR million). Source: FOCUS Marketing Research 2020c in Statista. Own representation.

As clearly shown in figure 20, EUR 254 million were invested in radio advertising in Austria in 2019 (FOCUS Marketing Research, 2020c). This represents an increase by 4.4% compared to 2018.

According to own research[4], it currently costs between EUR 5,000 and EUR 12,000 to have 15 to 40 spots broadcast, depending on the selected radio station and broadcasting time.

3.2 Below-the-line tools

In addition to classical advertising, other advertising measures are increasingly being used. The so-called below-the-line measures include advertising that is not addressed to mass media. Examples of this form are product placement (Fuchs & Unger, 2014, p.302ff) (use of branded products in films, television or video games (Bak, 2019, p.18)), sales promotion (see chapter 3.2.3) and public relations (Fuchs & Unger, 2014, p.239ff) ("interest-led corporate communication" (Bak, 2019, p.18)). Also, events, which were able to position themselves as an increasingly important communication channel (Bruhn, 2003, p.321), and the entire field of event marketing ("Planning, organization and control of staged events within the framework of

[4] The author gathered quotes from the Austrian nationwide radio stations Ö3, Kronehit and 88.6.

corporate communication. Emotional and physical stimuli as well as strong activation processes are triggered by experience-oriented company or product-related events". Lucas & Matys, 2003, p.29) belong to below-the-line measures.

Selected below-the-line measures, which are already being applied in Austria, will be described in more detail below. In this case, too, a selection had to be made, as the presentation of the totality of all below-the-line measures would go beyond the scope of the work.

The below-the-line measures mentioned will be embedded in the framework of the wine industry in the next chapter.

It is particularly important to mention that in contrast to the presentation of above-the-line measures, a focus is placed on below-the-line measures. This is because the implementation of below-the-line measures is more widespread in the Austrian wine industry and easier to integrate into daily business at a manageable budget.

3.2.1 Events

Possible definitions of events range from "activities of all kinds" to the term "marketing event" as a "special event that companies use to achieve their communication goals" (Bruhn, 2013, p.464; Nufer, 2012, p.21; Drengner, 2008, p.24ff.). Wünsch and Thuy (2007, p.15) define events as event communication by the following parameters, among others: a special event that is integrated into a specific communication or marketing strategy, pursues specific goals, the achievement of which is measurable, combines an experience with a message, understands guests as a target group, has a specific occasion and has a specific budget.

From a business perspective, events are to be seen as a service (Drengner, 2014, p.117 in Zanger after Weiß 2008, p. 112ff.; Wochnowski, 1996, p.23ff.). It is also important to mention the relation between events and consumption: Events are perceived as consumer experiences and these result in subjective experience of the consumption of a service (Drengner, 2014, p.119 in Zanger, 2014 after Bruhn & Hadwich, 2012, p.9). Exceptional consumer experiences have the potential for successful marketing of services (Drengner, 2014, p.119 in Zanger, 2014 after Tynan & McKechnie, 2009, p.503f.).

Furthermore, event marketing can consolidate its place within the mix of marketing communication instruments. The event manager, as the "gatekeeper" between the agency and the company, can contribute to the optimal adaptation of the event concept to the communication strategy of the company during its development (Drengner, 2003). Another essential parameter is that the event industry is definitely a growing market (Erber, 2009, p.9). In 1993, Kinnebrock wrote that "integrated event marketing, provided that the entire defined range of possibilities is used, is a modern addition to the existing communication mix (Kinnebrock, 1993, p.140). Today, events are communication instruments of equal importance – they are to be mentioned in the same breath as advertising, sales promotion, public relations and direct marketing (Schäfer-Mehdi, 2015, p.19). Fuchs & Unger (2014) are of the opinion that "the increasing necessity to address the target persons individually, at least additively, gives increasing importance to interactive forms of communication and dialogue mechanisms. Especially the change in values towards an emphasis on leisure time and an increasing experience and enjoyment orientation speaks for the use of event marketing" (Fuchs & Unger, 2014, p.321).

Evaluation of the event sector in Austria

On the subject of "event marketing", the authors Schnabl, Kluge, Lappöhn and Zenz (2017) from the Institute for Advanced Studies in Vienna investigated the event business in Austria on behalf of the Professional Association of the Hotel Industry in the Austrian Federal Economic Chamber. In order to take the diversity of the Austrian event business into account, primary data collection was carried out with regard to the event expenditures of companies and public administration in 2010 and updated by the authors in 2015. The updated study delivered the following results (in case direct comparison values to 2010 are available, they are given) and demonstrated the importance of the Austrian event sector:

- The event industry in Austria is characterized by a variety of events which play an increasing role in different social areas.
- In addition to the aspects of cultural exchange and experience, events can also be regarded as economic assets.
- In 2015, companies spent around EUR 2.02 billion on their own events (excluding the participation of external event agencies).
- Municipalities and public institutions spent around EUR 553 million on events.
- Event agencies made a total turnover of around EUR 3.8 billion.
- Tourists who visited events during their stay in Austria consumed EUR 2.12 billion in

Austria for transport, accommodation, etc.

- While companies and public institutions are estimated to spend slightly less on events than in 2010, the turnover of event agencies is rising steeply. This suggests a certain tendency towards professionalisation.
- In total, the expenditure in connection with the events organised in Austria in 2015 thus amounted to EUR 8.5 billion.
- The gross value added in Austria triggered by event expenditure totalled almost EUR 8.9 billion (+21,92% compared to 2010). This figure includes not only direct but also indirect as well as consumption- and investment-induced effects. This corresponds to almost 2.9% of the total Austrian gross value added. The events sector thus maintains its significant position for the Austrian economy.
- A further EUR 3.7 billion of value added is created abroad, as part of the preliminary inputs along the value chain is imported.
- More than 140,000 jobs (+33.17% compared to 2010) will be safeguarded by the events in Austria, which corresponds to about 3.4% of the total workforce in the country.
- The public sector benefits by collecting around EUR 3.5 billion in taxes and duties (+45.83% compared to 2010).
- Social security benefits the most, followed by the Federal and State Government.
- In addition to the events sector, the main beneficiaries are accommodation and catering, real estate and artistic activities (Schnabl, Kluge, Lappöhen & Zenz, 2017; Schnabl, Mateeva, Titelbach & Zucker, 2012).

Trade fairs as a special form of event

A trade fair, which is generally classified as belonging to the service sector (Kirchgeorg, 2003, p.1), is understood to be an "event of a market nature, which offers a comprehensive range of products and services from several sectors of the economy or from one sector of the economy". In general, a trade fair is held at the same location at regular intervals once or several times. It is a place of sale based on exhibited samples for resale or commercial use (Kenning, 2018). Moreover, trade fairs are excellent economic and competitive observers and have the potential to open doors to new markets (Knoll, 2019, p.7).

In addition to their business marketing functions – trade fairs have the broadest range of functions of all marketing instruments –, they also have assigned economic and social functions.

Trade fairs are networking events, from regional exhibitions to mega-events, test markets for products, innovations and research results and provide an overview of the competitive situation in a sales-promoting atmosphere. In addition, they are sales generators for the regional economy, create jobs and also perform a social function as knowledge transfer points. In addition, trade fairs have recently taken on the increasingly important function of information transfer (Knoll, 2019, p.15fff.).

Fairs all over the world

All over the world, there are about 1,100 trade fair venues (data vary from 1,100 to 1,200 – according to the international fair organisation UFI) and a hall space of approximately 35 million m^2. Each year around 31,000 fairs with 4.4 million exhibitors and 260 million visitors take place (Auma, 2020).

Fairs in Europe

When it comes to trade fairs in Europe only, it has to be stated that, according to Expodatabase, 34 of the 45 worldwide trade show venues are based on this very continent. 18 of these are members of EMECA, the European Major Exhibition Centres Association. These 18 venues host approximately 1,200 fairs with about 388,000 exhibitors and 43.5 million guests each year. Additionally, the economic component shall not be underestimated: The turnover of these 18 fair venues is about EUR 800 billion. According to the audit firm KPMG, the economic effects of these 18 venues are EUR 16 billion (Expodatabase, 2017).

As a continent, Europe has a century-long tradition when it comes to trade fairs and is the leader in the fair business. More than 90% of the world's leading trade fairs take place in Europe. Number one in Europe is Germany, followed by Italy, France, Spain and Russia. Trade fairs in Europe are said to represent a consequent development of fair concepts, innovative services for both exhibitors and visitors and a high level of infrastructure (Expodatabase, 2017).

Fairs in Austria

According to "Messen Austria", the database for Austrian trade fairs, there are 120 fairs held in Austria each year, of which 35 are carried out by the fair company "Reed Austria", which is Austria's biggest organiser of trade fairs. Among these fairs, 39 are B2B-fairs and 12 of these are organised in the food and beverage sector (Messen Austria, 2017). Reed Exhibitions Messe Wien and Reed Exhibitions Messe Salzburg welcome around 12,000 exhibitors and 920,000 visitors at its 35 fairs in Vienna, Salzburg, Graz and Linz and on the fair grounds of the Messe

Wien each year (Auma, 2017). According to “Messen Austria“, the Austrian trade fair grounds make a great contribution to the regional added value. The effects on this very economic area are said to be positive. Austrian fair visitors say that they are satisfied with the quality of visited fairs and that they would recommend these very fairs. On the one hand, nearly all of Austria ‘s fair grounds stick to fairs for public audience – the fairs with most exhibitors are often exhibitions for consumer goods and take place in spring or autumn. On the other hand, speciality fairs are well established everywhere, too. In the last few years, Austrian fair organisations have invested in the renewal of infrastructure and have built new halls and exhibition grounds including space for congresses (Auma, 2017).

3.2.2 Product ratings and awards

Already for a long time, awards have been very important marketing instruments for farm products. For the customer, they offer the possibility of an objective comparison of different brands, whereas for the producer, they are a marketing aid and represent an inducement for improving quality (Landwirtschaftskammer Oberösterreich, 2019).
Experience has shown that participation is consistently well received by customers (Landwirt, 2019).

Relevance and influence of product awards on purchasing decisions
In the following, a German study on product awards in the agricultural sector shall be presented: The German Agricultural Society DLG had product awards evaluated by a market research study. For the series of consumer surveys completed in November 2007, a total of more than 600 women aged between 20 and 60 years were interviewed about their shopping behaviour using concrete product examples. This was used to investigate the awareness and sympathy of DLG awards as well as their relevance and influence on purchasing decisions. The main results of the study are as follows: DLG product awards demonstrably increase purchasing incentives. Other well-founded awards have a similar significance. 60% of the consumers surveyed are familiar with the DLG awards and perceive the DLG medal as a high-class distinction and as a quality feature of food. The DLG awards have an above-average effect on the purchase decision. The awareness of the awards results primarily from the product groups meat products, dairy products, beverages and confectionery. On a scale of 1 (no confidence) to 10 (very high confidence), consumers have above-average confidence in the DLG awards (Foodaktuell.ch,

2007). Although the study was already conducted in 2007 and designed for the German market, it is assumed that the most important findings also apply for the Austrian agricultural market.

3.2.3 Sales promotion

There is no uniform understanding of what sales promotions mean, their scope and the exact nature of the tasks involved, nor of what activities and measures are to be understood by them.

Therefore, different definitions of sales promotions, which are classically assigned to communication policy in the marketing mix (Nieschlag, Dichtl & Hörschgen, 2002, p.992), can be mentioned: Birkigt (1983, p.26) describes sales promotion as an overarching instrument that supports and influences all measures taken by a company to provide support for its sales helpers and sales agents by means of the goal-oriented use of the canvassers charged with sales promotion. Großklaus (1982, p.16) provides another possible definition. For him, sales promotion is the sum of all measures that the product/service etc. pushes through the logistics chain to the end consumer through selective measures or campaigns at the sales organization (own sales force), sales agent (retail) or end consumer (= push strategy). According to Bruhn (2010), "sales promotion can be described in the following way: it is the analysis, planning, implementation and control of mostly temporary measures with an action character with the aim of achieving the communication and sales goals of the company at downstream distribution levels through additional incentives" (Bruhn, 2010, p.384).
The main common features of these definitions are:

- Sales promotion is a communicative process.
- Proximity to sales is dominant.
- The main target groups of sales promotions are both the company's own sales organs and the trade and end consumers.

The importance of sales promotion (measured by its share in a company's overall communication budget) cannot be ignored and has recorded significant growth in recent years (Fuchs & Unger, 2014, p.218 after Fuchs & Unger, 2003). In Germany, about 25% of the communication budget is spent on sales promotion. The number of sales promotions in food retailing is around 3,000 per year, with total costs of over EUR 5 billion (Hoffmann, 2009, p.42; Rudek, 2008, p.110). In the USA, sales promotion activities are even more important: Batra, Myers & Aaker (2009, p.96), for example, provide the following information: "In fact, many consumers automatically assume that if a brand is being promoted it must be a good deal (which is not always true!). By one estimate, 80% of U.S. house holds use coupons, 75% of the appliances bought in the U.S. are bought on deal, and 70% of the packaged goods sold to retailers are sold with a trade promotion.

From a marketing perspective, sales promotion can be used for various purposes, such as expanding distribution, opening up new sales channels or acquiring new customers at the point of sale, where about 70% of all brand purchasing decisions are made (Däuber, 1996, p.92fff.; FFI Study Shopper, 2011; Bürger & Wilkes, 1985; Fuchs & Unger, 2014, p.221).

3.3 Through-the-line tools

Over a period of time with advancement in technologies and increased competition, an integrated market penetration approach emerged which blurred the lines and included aspects of both above-the-line and below-the-line approaches. This approach is called through-the-line. (Dagur, 2020). While – as described above – above-the-line methods aim to penetrate the mass market and are considered non-targeted and below-the-line measures target segments of the market and are considered appropriate for achieving conversions through the use of direct customer engagement, through-the-line communication, however, involves the use of both above-the-line and below-the-line marketing strategies.

The primary objective of this approach is to get a holistic view of the market and to communicate with the customers in every possible way. It refers to 360-degree advertising, where campaigns are developed incorporating the vision of brand visibility as well as brand recall (conversions) (Dagur, 2020; Pahwa, 2019; Furman, 2017).

In a nutshell, it can be summarized that, with consumption trends shifting constantly, it was needed to find ways to address these changing demands. Through-the-line marketing activities help use an integrated approach to advertise products to both mass and focused markets simultaneously (Furman, 2017).

The major challenge of through-the-line activities is the cost associated with implementing various promotional campaigns. It is usually only established for financially secure companies that can implement through-the-line activities successfully (Furman, 2017).

Examples of implemented through-the-line activities may be:

- 360-degree marketing: Using both above-the-line and below-the-line activities – for example, a television advertisement supplemented with pamphlets of the product attached to newspapers.
- Digital marketing: Online banners and buttons, social media posts, blog articles (Furman, 2017).

This approach leads directly to the topics of digitalisation and digital marketing, which are inextricably linked to the through-the-line approach.

The importance of digitisation

"Marketing is probably the operational area of the economy that has already been shaped and changed the most by digitisation." (Wagener, 2018 in Wolff & Göbel, 2018, p. 125 ff). The background to this assertion is that digitisation – the digital conversion and representation or performance of information and communication (Bendel, 2018) – and especially the advent of the World Wide Web have fundamentally changed marketing, sales and advertising. Long-held cornerstones in marketing, such as the relevance of the content environment in advertising placements or the importance of classic customer loyalty measures, need to be reassessed. By analysing the data collected en masse, a multitude of marketing decisions can be made efficiently and effectively today, often even fully automated, without the need for any downstream human decision-making influence anymore. Digitisation and the data economy have undoubtedly had a revolutionary effect on marketing (Wagener, 2018 in Wolff & Göbel, 2018, p. 128).

In this context, the *implementation of integrated marketing communication* is of particular importance. Especially in the online sector it is clearly visible that the networking of the individual tools and coordination of the individual measures are necessary to successfully design a communication strategy. The following subchapters are dedicated to the areas of web marketing and online advertising. Here it is clearly visible that the interaction of several components is indispensable for the success of a campaign.

As with above- and below-the-line tools, it should be emphasized that only a selection of through-the-line tools can be presented in the course of the work.

3.3.1 Web marketing

In contrast to classic advertising media such as print ads and established below-the-line tools such as events, the area of web marketing comprises more than the area of promotion. Web marketing also includes marketing and communication platforms which in the classical understanding would rather be attributed to the place within the marketing mix. Therefore, in this case an assistance for the winemaker is to be pointed out, because it is assumed that in the still relatively young area of web marketing the knowledge is not yet as profoundly developed as in the offline area. Therefore, it is further elaborated and set earlier in the process and general information about the Internet as a platform for the marketing of products is given.

Character and areas of web marketing

Web marketing, also referred to as digital marketing and Internet marketing, defines all marketing activities that take place with and on the Internet. With the growing opportunities and challenges of the Internet, web marketing has developed not only as a communication instrument for the policy of the marketing mix (product, price, promotion, distribution), but also to new types of business models in which, for example, the web offer itself is a product. The goals of a company concretize the strategy that is used in the context of web marketing to successfully compete in the market. Possible goals are, for example, brand management, turnover generation, profit maximisation or even long-term customer loyalty (Fuchs, 2020; Market Business News, 2020).

On the Internet, numerous measures are taken to ensure successful action. The central component of the web presence is a website of a company, but in this context, the social media presence of companies – their social media profile or social media page – must also be mentioned. These represent a virtual place in the World Wide Web. The online presence focuses on the presentation and communication of information and topics of all kinds, as well as the trade of products and services. In sales, for example, online shops, online auction houses and online mail order companies can present and offer their products and services and accept or arrange orders. In addition to the creation, design and development of a web presence, web marketing is primarily concerned with publicity and sales promotion on the Internet. The aim is to be found among a wealth of information and offers on the Internet and to lead qualified visitors to the website and finally to win over customers and interested parties, generate turnover and make profits within the framework of e-commerce (Fuchs, 2020; Market Business News, 2020).

This fact leads to the most essential potential of web marketing: Targeting, i. e. the exact target group approach. A distinction can be made between targeting according to external data, such as socio-demographic data often given by the users themselves, e. g. when registering to platforms, or the so-called geo-targeting – addressing on the basis of regional demarcation criteria, for example to certain cities –, or according to the information environment – with this approach, the individual addressee is not examined for their characteristics, but the environment of the placement is selected to match the advertising media. Another possibility of differentiation is targeting according to behaviour. In behavioural targeting, the aim is to analyse the previous user behaviour of a target person in order to obtain information about interests, on the basis of which the appropriate advertising is to be transmitted. On the internet, user behaviour is usually "recorded" by means of browser cookies. Personalised advertising can then be delivered according to the recorded behaviour. A special form of behavioural targeting is so-called re-targeting. Based on a previously performed action in the same environment, the user is confronted again with his activity (via cookie) because it may not have been completed (e.g. because a user aborted a purchase transaction in an online shop). In this case a new delivery of advertising material takes place, also on other websites that the user visits: the aim is to "track" the user until they complete the sales process, once it has been initiated. A fourth way of distinguishing targeting options is targeting as an advertising impact catalyst, such as frequency capping. In contrast to the methods presented so far, the focus here is not on the "fit" of an advertising message to the needs and interests of the addressee, but rather the optimisation of the budget with regard to the advertising effect of an advertising medium. Frequency capping is used to determine the number of deliveries per user. Instead of "penetration", i.e. the repeated confrontation of an addressee with an advertising message in order to achieve a qualitative effect, the quantitative goal of increased reach is pursued (Wagener, 2018 in Wolff and Göbel, 2018, p. 129fff).

The online advertising tools presented in the following chapter have the task of attracting interested parties and customers to corresponding websites in order to be able to transport the desired content and generate conversions.

3.3.2 Online advertising

Originally, online advertising, which is considered the oldest online marketing instrument, is understood to mean the placement of advertising media in the form of banners, pop-ups, ads, microsites or as an advertisement on the results pages of search engines (today referred to as “classic online advertising”) (Schweiger & Schrattenecker, 2013, p.27ff.) and on Internet pages to support marketing and communication objectives. Today, this traditional form is supplemented by other forms, such as social media advertising or search engine advertising.
Categories of measures are also distinguished online – as well as offline (Lammenett, 2014, p.122ff.). Online advertising follows the same principles as traditional advertising does – it is a paid form of communication that is used to promote the sales of the advertised product (Armstrong, 2001, p.28). To achieve these defined goals, online advertising tries to convince its addressees by using written language, graphics and sometimes sound. Similar to print ads, online ads are also brought to their target groups by means of a carrier medium. The big difference to print advertising is that online advertising is reaction oriented (Janoschka, 2004, p.47). This means that – in the best case – the addressee of the advertisement clicks on the banner and thus becomes identifiable by the analysis of cookies and can be analysed by the person placing the advertisement (Schweiger & Schrattenecker, 2013, p.27ff).

The gross advertising expenditure for online advertising in Austria is shown in figure 21.

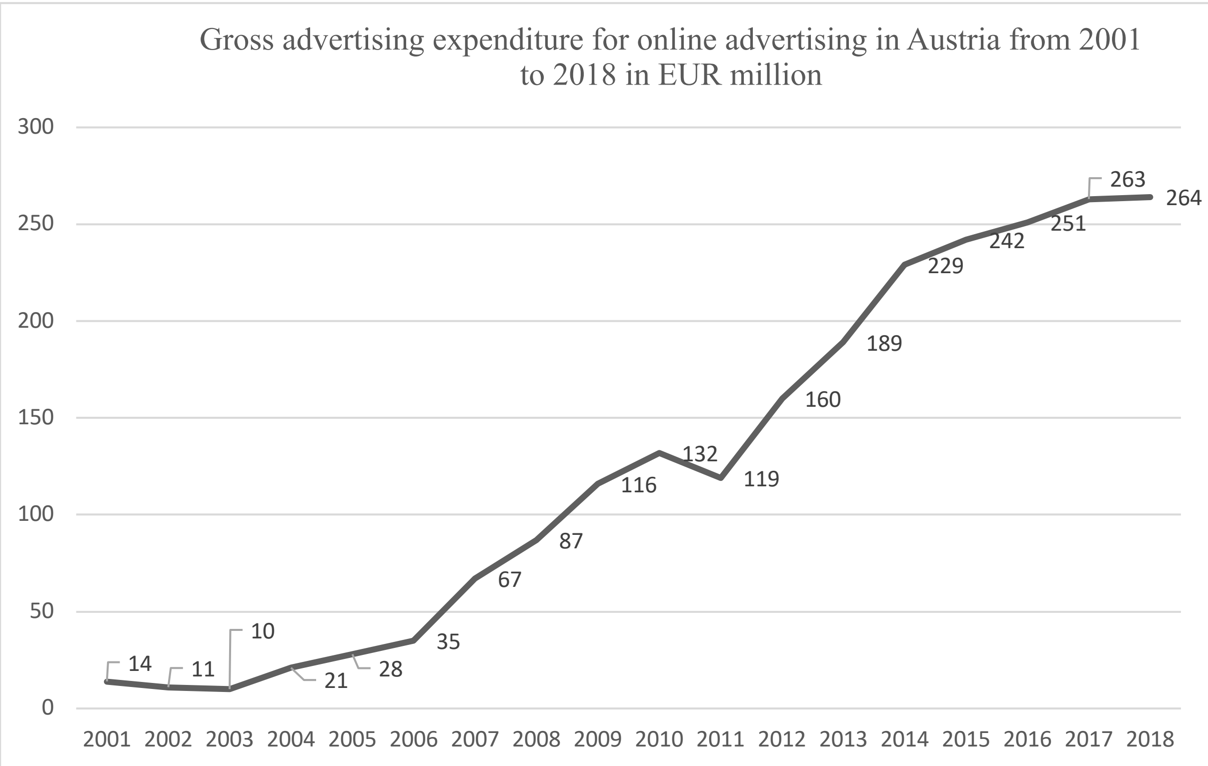

Figure 21: Gross advertising expenditure for online advertising in Austria from 2001 to 2018.
Source: FOCUS Marketing Research (Media FOCUS Research) 2020e in Statista. Own representation.

Figure 21 clearly shows that the gross advertising expenditure for online advertising in Austria increased from EUR 14 million to EUR 264 million between 2001 and 2018 (FOCUS Marketing Research, 2020e). This corresponds to an increase by 1,785.71% – a figure that bodes well for the success of this form of advertising.

In the following, different forms of online advertising shall be described in more detail. The form of classic online advertising was already discussed at the beginning of this chapter and therefore will be left out in the detailed descriptions below.

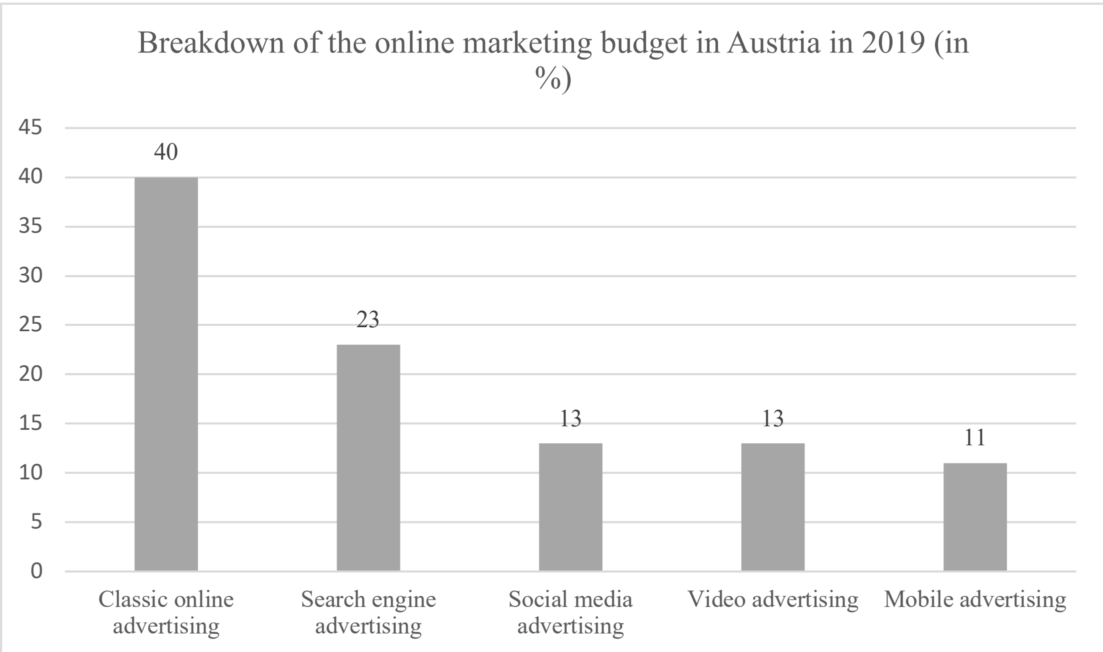

Figure 22: Breakdown of the online marketing budget in Austria in 2019.
Source: FOCUS Marketing Research, 2020h in Statista. Own representation.

Figure 22 shows different forms of online advertising and their shares in Austria in 2019.
In 2019, experts estimated that 40 per cent of the online marketing budget in Austria went to traditional online advertising. Mobile online advertising, on the other hand, accounted for only 11 percent of the budget. It is estimated that EUR 277.9 million was spent on traditional online advertising in 2019, EUR 205 million on keyword advertising, and EUR 73.6 million on social media advertising (Momentum Wien, 2019).

Search engine and keyword advertising

Search engine advertising is the paid placement of commercial advertisements in the form of a short text description on the website of a search engine. It has a positive effect on the so-called organic search, the results of a search query (Königstätter, 2019). This ad appears to the user when he or she starts a search query that correlates with the keyword specified by the advertiser (Lammenett, 2014, p.122ff). According to Ruisinger (2011, p.47), 45% of users click on the first three to four search results and 40% on the ads placed above or next to them (paid search engine or keyword advertising). This allows conclusions to be drawn about the current great advertising importance of search engines (Schweiger & Schrattenecker, 2013, p.27ff).
It is estimated that an amount of EUR 205 million was spent on keyword advertising in Austria in 2019 (Momentum Wien, 2019).

Social media advertising will be discussed in the next sub-chapter.

Video and mobile advertising

Regardless of where it appears on an internet-enabled device, video advertising is defined as an advertisement for a product or service featured in a video format (Hendricks, 2020). This can also include ads that are launched via familiar online marketing tools. For example, it is possible to create a keyword advertising campaign via Google Ads that exclusively serves smartphones (Lammenett, 2019, p. 469f).

As can be seen in figure 22, video advertising ranks 4th with a market share of 13% when it comes to online marketing budgets in Austria in 2019 and mobile marketing ranks 5th with a market share of 11% (FOCUS Marketing Research, 2020h in Statista).

Newsletter advertising

Newsletter advertising is the information of customers, who have agreed to this form of contact, by means of an e-mail newsletter on a regular basis. This form of communication is used to draw attention to products and services, to impart knowledge and also to create targeted communication occasions. In the case of e-mail newsletters of media, e.g. magazines, it is also possible to purchase advertising space within a newsletter and use it for communication purposes, marked as advertising (Lammenett, 2014, p.122ff and Schweiger & Schrattenecker, 2013, p.27ff).

3.3.3 Social media advertising

Although social media advertising is a special form of online advertising, a separate chapter will be devoted to it, as this form of advertising is becoming increasingly popular in Austria. A characteristic feature of advertising on social media platforms is the high degree of targeting possibilities, which means that the target group to which the advertising message is to be delivered can be very precisely defined and restricted in advance, thus keeping any possible scatter loss to a minimum. A further advantage is that payment is based on information delivery and can therefore be controlled and adjusted during the term of advertising (Lammenett, 2014, p.122ff). According to the Austrian Federal Economic Chamber (Wirtschaftskammer Österreich, 2019, p.15), Facebook is currently the most important social media platform in Austria, and its possibilities also play a significant role for companies.

As can be seen in figure 22 in chapter 3.3.2, 13% of the online marketing budget used in Austria in 2019 was allocated to social media advertising, on which EUR 73.6 million was spent (Momentum Wien, 2019). According to the forecast, sales of social media advertising in Austria are expected to increase significantly by 2022 (FOCUS Marketing Research, 2020h in Statista).

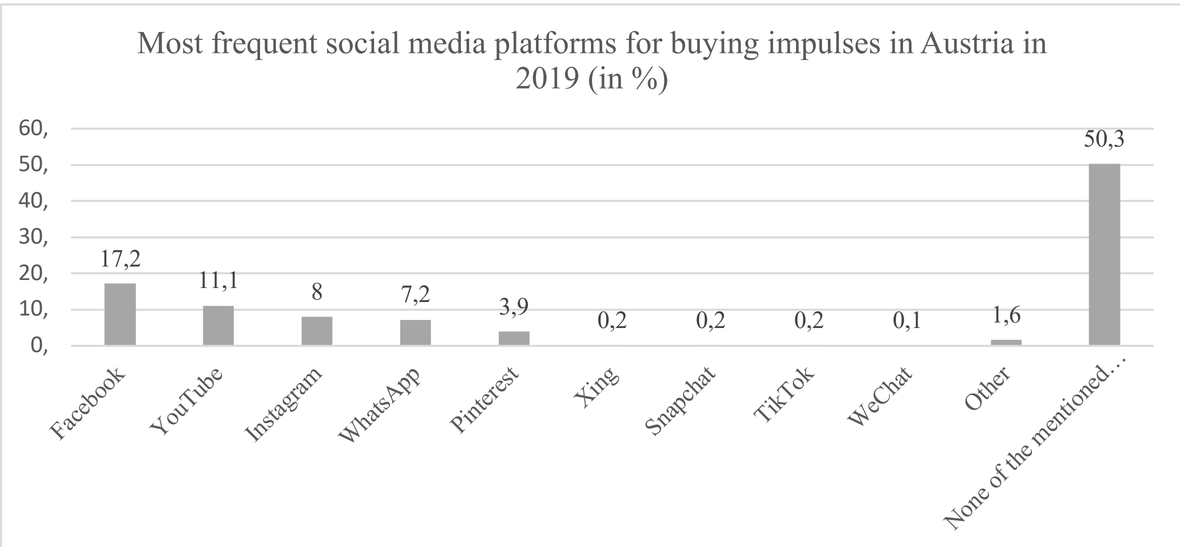

Figure 23: Most frequent social media platforms for buying impulses in Austria in 2019.
Source: MindTake & Handelsverband Österreich in Statista, 2020. Own representation.

Figure 23 shows the most frequently mentioned social media platforms for purchase decisions in Austria in 2019. As a study of 1,020 respondents aged 18 to 69 revealed, 17.2% of respondents said they had bought products or used services because of Facebook. For 11.1%, YouTube was a trigger for buying impulses and for 8% Instagram. Although a large proportion of respondents (more than 50%) said that none of the channels mentioned provided impetus to buy, the influence of social media advertising is clear to see (MindTake & Handelsverband Österreich in Statista, 2020).

Viral marketing and electronic word of mouth

Closely linked to social media are the terms viral marketing and electronic word of mouth (Kaplan and Haenlein, 2011, p. 254 in Wilde, 2013, p. 8). Thus, these terms shall be defined, and their importance shall be explained.

Henning-Thurau et al. (2004, p. 39) define electronic word of mouth on the basis of Stauss (2000, p. 243) as "[...] any positive or negative statement made by potential, actual, or former customers about a product or company, which is made available to a multitude of people and institutions via the Internet." (Wilde, 2013, p. 11) and viral marketing as "[...] electronic word of mouth in which some form of marketing message related to a company, brand or product is transmitted in an exponentially growing way, often through the use of social media applications" (Wild, 2013, p. 8). Viral marketing is therefore a marketing strategy in which advertising or content is not distributed by a company to all target persons (as is the case with classic TV advertising, for example), but instead the message spreads from user to user, i.e. virally (like a virus). Companies use viral marketing in the hope of achieving high reach at low cost.

Although no current official data on the use of viral marketing and electronic word of mouth in Austria could be found, the Austrian Chambers of Commerce recommend the use of this form of advertising in their guide "Social Media erfolgreich nutzen. Version 9.0" (How to use social media successfully) (Austrian Chambers of Commerce, 2020). (Wirtschaftskammern Österreichs, 2020).

4 Marketing communication tools in the (Austrian) wine sector

Historically, the majority of Austrian wine-growing enterprises originated from mixed agriculture or were considered to be purely part-time. Coming from this background, even today it is still not a matter of course for many farms that the production and subsequent marketing of wines can be successfully managed. For this very reason it is essential to expand the knowledge of the winegrowers about the marketing communication tools to be used and to provide support in the area of promotion, how the existing potential can be optimally exploited. Therefore, the communication tools described in chapter 3 will now be presented and analysed with regard to their application and importance in the Austrian wine industry. The presented data are analysed with the help of existing literature as well as self-conducted short studies.

4.1 Above-the-line tools in the Austrian wine sector

Wines, just like all other products, have to be marketed and this usually requires a certain degree of awareness. This means that wineries are also dependent on advertising their products and bringing them closer to a defined target group in order to make these same people aware of the products, arouse their interest, taste them and – in the best case – buy them repeatedly. Therefore, classical advertising is a possibility to spread information and influence relevant attitudes of the target group towards the product, also in the wine sector in Austria. In the following, the selected above-the-line tools (see chapter 3.1.) are presented within the framework of the Austrian wine sector.

4.1.1 Print advertising

The following chapter provides an overview of selected wine magazines from Austria. It is important to mention that a wine company is not limited to advertising in an Austrian magazine or a wine-related print product. Since an analysis of all wine magazines worldwide as well as all products outside the wine sector is beyond the scope of this work, the focus lies on Austrian wine magazines. The decision to do so was also based on the fact that 80% of Austrian wine production is consumed in the country itself.

An overview of the most important wine-related print media in Austria is presented in table 1 below:

Magazine	Copies	Issues per year	Price of ads (full page, in EUR)	Further products
Falstaff	140,000	8	8,600	Wine guides
Vinaria	20,000	7	3,500	Wine guides
Der Winzer	10,675	12	between 4,228 and 9,990	Newsletter of the Austrian Winegrowers' Association
A la Carte	31,500	4	5,700	Wine guide

Table 1: Wine magazines in Austria.
Source: Falstaff Verlags GmbH (2019), Vinaria (2020a), Der Winzer (2020) & A la Carte (2020). Own representation.

As can be seen in table 1, the Austrian wine magazines mentioned, Falstaff, Vinaria, Der Winzer and A la Carte, differ both in the number of copies and issues per year. The prices for a full-page advertisement also vary significantly, from EUR 3,500 to 9,900. While Falstaff, A la Carte and Vinaria also publish wine guides in addition to the magazine, Der Winzer functions as a newsletter for the Austrian Winegrowers' Association.

Due to the lack of available statistical data on the importance of print advertising for companies in the Austrian wine industry, four experts were interviewed in December 2019[5]. The output of the survey can be summarised as follows: Advertising in the Austrian wine industry in print media, especially in trade journals, is not recommended (any longer), as the information-seeking behaviour of consumers has changed away from print media towards online media and the price-performance ratio of the media is no longer coherent. However, print advertising can still make sense if placed in cooperation with a distribution partner and if the target group of the medium fits the strategy of the company (Stoll, 2020).

Although four interviews cannot be considered representative for the Austrian wine industry, it has to be stated that the findings of this research correspond the official statistics on the use of media in Austria and therefore, are worth paying attention to. In addition, they form the basis for further research studies.

[5] The interviews were conducted by the author.

4.1.2 TV advertising

Little is known about the use of TV advertising in the Austrian wine industry, but observations have shown that few Austrian winegrowers use this advertising channel. The reason for this is presumed to be the high budget required for placing advertisements on TV.
When it comes to the largest group of SMEs within the Austrian wine industry – 2,371 wineries – which are characterized by an average wine production of 5,000 to 30,000 litres (Österreich Wein, 2020b, p.42), TV advertising is generally not used. However, those winegrowers who make use of this advertising channel are among the largest enterprises in the country and score points with a nationwide distribution structure that is based primarily on the food retail trade. In addition, experience shows that winemakers who use TV advertising do so exclusively together with a sales partner.

As with the field of print advertising, four short interviews were conducted on the subject of TV advertising in the Austrian wine industry[6] – with the following result: TV advertising is uninteresting and not possible for most Austrian wine companies due to the high costs (Stoll, 2020). This statement was also taken into account in further research planning.

4.1.3 Out-of-home advertising and ambient marketing

Out of home advertising in the wine sector in Austria is primarily used by wine service providers, but also wine producing companies, especially in tourist regions, make use of it. Observed locations are motorway exits and well-travelled routes in rural areas[7]. This form of advertising should not be underestimated for wineries, especially in connection with wine tourism, as the costs involved are manageable (see chapter 3.1.3).

The topic of out-of-home advertising was also discussed in the form of short interviews[8] in the absence of official data. In this respect, the experts state that this form of advertising is of interest to a specific group of Austrian winegrowers, namely those who are well listed in the retail trade and is most effective if it is placed together with a sales partner close to sources of supply (Stoll, 2020).

[6] 4 interviews with experts of the Austrian wine industry were conducted by the author in December 2019.
[7] This information is based on the professional experience of the author.
[8] 4 interviews with experts of the Austrian wine industry were conducted by the author in December 2019.

In the area of ambient marketing, no official data could be found for the Austrian wine industry. This could be attributed to the fact that ambient marketing is a very new form of advertising.

4.1.4 Radio advertising

As in the case of TV advertising, hardly any data is available on radio advertising in the Austrian wine industry. It is a fact that two of the largest wine-growing enterprises in Austria use radio advertising. Both companies are listed in the Austrian trade and are known for basic qualities in large quantities. This observed fact is possibly justified by the costs to be used for this advertising format (see chapter 3.1.4).

There are also no official data on radio advertising in the wine sector in Austria. Therefore, four experts were interviewed[9] on this very subject and stated that advertising on the radio is of little interest to Austrian wine companies. This can be attributed to the high budget allocated to a nationwide radio campaign on the one hand and to the product group itself on the other. Wine and luxury items are more difficult to advertise via radio, as the acquisition of information alone does not lead directly to a purchase in this case, as luxury items usually benefit from being tasted (Stoll, 2020).

4.2 Below-the-line tools in the Austrian wine sector

Chapter 3.2 dealt with the presentation of selected below-the-line measures that have generally already found their way into business life in Austria. These measures are now to be embedded into the framework of the Austrian wine industry. This is important for Austrian winegrowers, as those enterprises that do not yet apply any of these measures can get a first impression and those wineries that already make use of below-the-line measures can generate additional knowledge.

[9] 4 interviews with experts of the Austrian wine industry were conducted by the author in December 2019.

4.2.1 Events

The following lines are dedicated to events and their special form of trade fairs in the Austrian wine industry.

In Austria, the number of events offered in the food & beverage industry is increasing every year. The interested consumer finds festivals (e.g. wine festivals, streetfood festivals, craft beer festivals, etc.), and events in different sizes and forms. The culinary hotspot is the federal capital of Vienna. In 2015, 5,695 of the 39,993 gastronomic establishments (excluding coffee houses) known to the Austrian Federal Economic Chamber were located there (Wirtschaftskammer Österreich, 2015). Furthermore, Vienna is also in the focus of all events related to luxury food. Historical locations are regularly used as well as modern facilities, and guests can attend events all year round. Customers interested in the field of wine and gastronomy can choose between several offers – tailored to their target group – in Vienna every single day. The Austrian customer is also willing to pay for these options.

The great advantage of events in the wine sector is based on the fact that wine as a luxury consumer product lives from being tasted. Only those who experience the taste of wine will buy the product. In addition, wine events are able to contribute significantly to an extraordinary consumption experience that has the potential to result in purchases. These factors should definitely be used by wine companies. In addition, events are to be taken seriously as a customer loyalty tool. This fact should also be considered by Austrian wine producers.

Due to the lack of official data on events in the Austrian wine industry, an expert in this field was interviewed on behalf of the Austrian wine industry[10]. The most important results of this interview, which formed the basis for the question design of the current research, are as follows: According to the interview, events are highly recommended as a form of communication and customer loyalty instrument and it is advisable for companies in the Austrian food and beverage industry to organise well-structured events for these purposes. It is important to address the target group very consciously and to address and service them via the channels that are appropriate for them. The size of the event must also be thought through in advance in order to guarantee the customer the best service possible. Only after positively experienced events the

[10] The interview was conducted by the author in 2016.

desired effects – such as customer loyalty or the acquisition of new customers – will be achieved (Stoll, 2016).

Although the interview cannot be considered representative for the Austrian wine industry, the inputs given shall be taken seriously as they correlate with the representative study on the Austrian event sector by Schnabl, Kluge, Lappöhn & Zenz (see chapter 3.2.1.).

Trade fairs as a special form of events
The Austrian Chamber of Commerce organises the participation of Austrian group stands in 116 foreign fairs, 14 of which in the food and beverage sector (Austrian Chamber of Commerce, 2017). Worldwide, 34 countries organise wine fairs. Germany hosts 19 fairs in the wine and viticulture sector and 30 in the food and beverage sector, whereas Austria hosts 6 fairs in the wine and viticulture sector and 9 in the food and beverage sector (Expodatabase, 2017).

It is essential to make good decisions about which trade fairs to participate in. Trade fairs are cost- and above all labour-intensive. However, with optimal preparation and follow-up, provided that an appropriate group of customers visits the fair, they have the potential to acquire new customers as well as to look after existing customers, to present new products and to conduct market research.

As there are no official data available on wine fairs in Austria, a short study with representatives of the Austrian Wine Marketing Board, of a trade fair agency based in Vienna and Dusseldorf and of an Austrian winery was conducted[11] on this topic. The results of the survey are as follows: The participation in trade fairs in the Austrian and German wine industry can still be recommended, as the positive outcomes can be assumed, provided that the preparation and follow-up work is carried out optimally as generally, visitors of wine fairs are well educated in this field and very well informed, too. They do not have the time to stroll around but go directly to the wineries they are interested in and which they have already been informed about.
Wineries have to be aware that there was a shift in the main function of fairs – from a selling tool only to a communication tool (when talking about B2B fairs). Although the success of the participation in a wine fair cannot be measured directly, it is highly recommended to Austrian and German wineries to participate in the leading wine fairs, which are Prowein in Dusseldorf, Germany, VieVinum in Vienna, Austria and Vinitaly in Verona, Italy. Side events are also a

[11] The study was conducted by the author by means of telephone interviews in 2017.

very important instrument and help create emotional bonds to the customers, which is indispensable for a long-lasting, successful business relationship (Stoll, 2017).

Within the scope of the general selling concept of a winery or a wine trading company, it is recommended to participate in the leading trade fairs. Of course, the selling and marketing objectives of the companies play an overriding role when it comes to making these decisions.

Although three interviews cannot be considered representative for the whole Austrian wine industry, the inputs given by the experts form the basis for further research work.

In order to substantiate the experts' statements regarding the most important wine fairs, data on the wine fairs mentioned will be presented below.

Trade fair	Visitors	Exhibitors	Hall space in m^2
Prowein	61,500	6,900	74,100
VieVinum	15,000	580	5,000
Vinitaly	32,000	4,600	100,000

Table 2: Wine fairs.
Source: Prowein (2020), VieVinum (2020), Vinitaly (2020). Own representation.

While Vinitaly has the largest area with a hall size of 100,000 m^2, Prowein is the unchallenged number one in terms of exhibitors (6,900) and visitors (61,500). VieVinum, as the smallest of the above-mentioned fairs, is nevertheless the largest wine fair in Austria (Prowein, 2020; VieVinum, 2020; Vinitaly, 2020).

4.2.2 Ratings and awards

Wine awards are an evaluation of submitted wines by means of point systems. They contribute to the orientation of the customer and offer, with good results, security in the buying process. The significance of the evaluations depends on the quality of the awards or the competition. In addition to parameters such as price per submitted wine and criteria for the awarding of points, the awareness of the respective award in the target market is also relevant for the winegrower.

When it comes to wine awards, it is essential for Austrian winegrowers to consider participating not only in Austrian but also in international competitions, as many Austrian consumers are very well informed and international awards also carry weight on the domestic wine market. For this reason, international as well as Austrian awards will be presented in the following.

A distinction can be made between point ratings of individual critics, such as Robert Parker, wine guides, such as Falstaff, and organisations, such as Salon Österreich.

A selection of internationally renowned names and magazines are:

- Robert M. Parker (The Wine Advocate, 2020)
- Stuart Pigott (Pigott, 2020).
- Wine Enthusiast (Wine Enthusiast Magazine, 2020).
- Wine Spectator (Wine Spectator, 2020).

In the USA, Vienna and Berlin, there are large international competitions. The best known are:

- IWC – International Wine Challenge (International Wine Challenge, 2020).
- DWWA – Decanter World Wide Awards (Decanter, 2020).

On a national level, there are wine guides and competitions which award prizes to the best wines of a country or a region. A selection of well-known Austrian wine ratings are:

- AWC Vienna: evaluates both on an international and national level according to a points-based system. Every year, more than 1,700 producers from about 40 countries take part in the evaluation. The AWC wine awards are not only linked to a title and medals, but also to prize money (Edlmoser, 2020).
- SALON Austria: The competition for Austrian wines, in which the 270 best wines of the country are awarded, is regarded as tough and independent. Sommeliers and journalists from renowned wine magazines form the jury (Österreich Wein, 2020c).
- Falstaff: The most famous award for Austrian quality wines is presented by the Falstaff magazine within the publication of the wine guides. The internationally known 100-point scale is used to rate wines, whereas wineries are awarded with one to five stars (Falstaff, 2020).
- Vinaria: The wine awards of the Vinaria magazine are becoming more important in Austria (Vinaria, 2020b).

4.2.3 Sales promotions

Especially in the wine industry, sales promotions are important measures to raise the company's awareness and strengthen its cooperation with trade partners. Specific opportunities, such as tastings at the point of sale in supermarkets or in the wholesale trade, not only inform existing customers and encourage new customers to taste the wines, but also convince the employees of the shopping outlet of the products in the course of the promotion and inform and train them about the winery. In the best case, this creates additional supporters, who spread the word about the wines and their producers and thereby increase awareness.

Another important measure in the wine industry is advertising cost subsidy. This also provides the opportunity to improve relations with trading partners and to be present in sales brochures, for example. Other forms of sales promotions are sample bottles for the sales staff, extra displays for positioning the products in the trade and bonus agreements (such as quantity or turnover bonuses).

Although no official data are available on the use of sales promotion measures in the Austrian wine sector, it is known from experience that Austrian wine-growing enterprises, especially those selling into the trade, use such measures in coordination with their distribution partners. The degree of application should be determined in further research, as well as whether this marketing tool is used optimally by Austrian winegrowers.

4.3 Through-the-line tools in the (Austrian) wine industry

As described for Austria in general in chapter 3.3, the following also applies to the specific area of the wine industry in Austria: the combination of above-the-line and below-the-line tools, i.e. the use of through-the-line measures, is particularly important in order to reach potential customers in every possible way.

4.3.1 (Austrian) Wine on the Web

The Internet has become a strong tool when it comes to presenting goods, companies and spreading the word – and it has also found its way into the wine business. The Internet is used as a marketing tool and especially as a communication tool for customers, who are used to go online to get information, ideas and also buy goods.

Data evaluations of Google analyses have shown that the term "wine" is searched for 8,100 times per month on the Austrian Google page (indication: high) (Der digitale Unternehmer, 2020a; Ubersuggest, 2020a). This can be contrasted with the term "beer", which is searched 9,900 times a month (Der digitale Unternehmer, 2020b; Ubersuggest, 2020b). Particularly striking in the analysis of the Google data is, on the one hand, the significant increase in search queries for "wine" in December (for comparison: beer peaks at the end of May) (Google Trends, 2020a), which may indicate that Austrians tend to drink more wine during the winter holiday season; and, on the other hand, that those federal provinces that also actively practice viticulture (Burgenland, Vienna, Styria and Lower Austria) are the provinces in which wine is most frequently googled (Google Trends, 2020b). The term "wine tasting" peaks at the end of September, thus showing the willingness of Austrian Google users to search for wine-related events after the harvest season (Google Trends, 2020c).

There is little literature about the Internet as a distribution channel for Austrian wines, but it can be said that this trade channel is getting more and more important (Austrian Wine Marketing Board, 2016).

In order to get a better insight into the wine industry, studies on web marketing activities of Austrian wineries are presented below.

The status quo of web marketing activities of Austrian wineries

The focus of the study of the web presence of Austrian wineries (Stoll, 2017b) was to find out, whether Austrian wineries use their websites as a tool for promoting and selling wines. The following parameters were taken into account:

- Topicality of wines (vintages)
- Topicality of prices
- Reference to a Facebook-page or any other social media page
- If contact details are easy to find
- If there is the possibility to register for a newsletter

The questions were answered by presenting data gained by observing the webpages of 350, randomly chosen, Austrian wineries (the population of bottlers in 2015 was 5,940 wineries, 4,500 of which filled more than 5,000 litres). Only wineries that bottle Austrian quality wine had been taken into consideration.

The most important findings of this study are:

- Out of 5,940 wineries, 2,341 wineries have stated to have a website (data given by the Austrian Wine Marketing Board), which means that 39.41% of Austrian wineries run a webpage at all.
- When it comes to the topicality of wines, it was examined if the current vintages of the wines were indicated on the website. 201 wineries stated the current vintages of the wines correctly. That equals 57.43% of all the wineries examined.
- The second parameter was "topicality of prices". It was examined if there was a current indication of prices of the wines. 41.71% of the wineries stated prices. Those were 146 wineries.
- 132 wineries (37.71%) fulfilled both of the above-stated parameters.
- The third parameter was "reference to a Facebook-page or any other social media page". 28.29% of the wineries (99 wineries) referred to a Facebook-page or other social media page.
- The fourth parameter was "contact details and if they are easy to find". 100% (350) of the wineries stated their contact details on their website.
- The last of the examined parameter was "the possibility to register for a newsletter". 17.43% of the wineries (61) gave visitors of their webpage the possibility to register for a newsletter.
- Only 19 wineries out of 350 (5.43%) could meet all examined parameters.

As can be seen with the study above, the Internet is not optimally used for marketing wines by Austrian wineries. Only 39% run a webpage at all and 5% of 350 wineries keep their webpages up to date when it comes to vintages and prices, refer to a Facebook or other social media page, indicate contact details and give the possibility to sign up for a newsletter. 57% of the examined webpages of Austrian wineries keep their wines up to date and 42% keep the prices up to date. 28% of the 350 wineries refer to their Facebook or other social media page and 100% indicate their contact details.

Generally said, there is need for improvement of the web presence of Austrian wineries as it is assumed that a professional web presence is related to economic success. Currently, most Austrian wineries are not using and accepting the Internet as a marketing (communication) tool for their winery and the selling of their wines, nor the Internet is used as a tool for customer retention and information by most of the examined wineries (Stoll, 2017b).

As a conclusion, it is highly recommended that Austrian wineries that run a website keep it up to date with regard to prices and vintages and use it or start to use it as a communication tool to inform their customers. It is also strongly advisable to link the own website to social media accounts.

After analysing the web presence of wineries from Austria, a look is taken at an even more detailed level, namely at the Austrian wine-growing region of Burgenland.

Web presence of wineries in the Austrian wine-growing region of Burgenland
Similar results as with wineries in Austria as a whole were obtained through a study carried out among 600 wine-growing enterprises in the Austrian wine-growing region of Burgenland by the University of Applied Sciences Burgenland in 2015. According to this study, almost 25% of the wineries investigated had no website at all (Wieschhoff, 2016, p.28ff). This figure was far below the Austrian average in 2014 – 14% of the farms then stated that they had no website (Statistik Austria, 2015). In comparison to Germany, only 6% of the winegrowers stated that they did not have a website in 2013 (Szolnoki et al., 2013). The most important statements of the study can be summarised as follows: The larger the company, the more present in the trade, the higher the quality standards, the higher the affinity to the Internet. Among the companies who run their own website, less than half (42%) offer online sales of their products.

Especially in the online sector, it is extremely important to look beyond the horizon and not only observe the Austrian market, since, as already described, customers can purchase wines from abroad without additional effort.

In the presented study below, the focus is on the neighbouring country Italy. This is particularly important for Austrian winegrowers, as Italian wines are the first to be imported, which means that Austrian wine consumers reach for Italian wines immediately after domestic wines.

Web marketing strategies of Italian speciality wineries

Begalli, Condurri and Gaeta (2008) analysed wine and web marketing strategies of Italian speciality wineries. By using a 7Cs model[12], the data of 272 wineries were analysed with regard to website quality (Begalli, Codurri & Gaeta, 2008, p.598-619).

The results of the study can be summarized as follows:

- Generally, the use of the Internet is not very common among the observed wineries. 28.3% do not have a web site at all (in 2.9% of the cases the website was not accessible). 60.7% have an active website.
- When it comes to the quality of the websites, the following parameter were analysed:
  - Content (design and updating): Among most wineries the graphics are good but updating is not.
  - Choice (product presentation): Product presentation is good among the websites analysed.
  - Context (interactivity of websites): Interactivity of the websites analysed (one to one link) is very poor.
  - Comfort (simplicity and enjoyment): Comfort is so-so. Navigability is okay, while the use of two languages is hardly present.
  - Convenience (selling activity): This parameter could not be evaluated because of the poor online selling activities.
  - Customer service (information on before and after sales): This parameter is difficult to evaluate, and unclear conditions are present and disappoint potential customers.
  - Community (networking between websites and customers): Websites lack in the ability of networking with the customer.
- 61% of the wineries with websites consider the Internet as an important communication tool. Fairs and food and wine events were considered an even more important tool.
- The group of wineries that didn’t have a website declared that their preferred communication channels were fairs, newspapers and food and wine events.
- 44.4% of all the entrepreneurs consider the Internet important.
- 80% of the wineries not having a website were planning to get one. 13.5% were already building or restyling.
- The use of Internet diminished the use of other communication channels.

[12] The 7 Cs: Content, Choice, Context, Comfort, Convenience, Customer Service and Community

- The Internet is a tool for customer retention.

In a nutshell, Italian speciality wineries with websites consider functionality most important when it comes to websites. The level of Internet marketing adopted by the Italian wineries is very low and does not encourage the wineries to move from product to market orientation. The web marketing approaches implemented by ISWs revolve the wish to effect online sales.
The overall result of this study is that there is need for development in the field of online marketing (Begalli, Codurri, Gaeta, 2008, p.598-619).
Although this study was already carried out in 2008, its significant results are still substantial its findings are still resonant today as can be seen with the results of the Austrian studies.

As in the general section, the online tools presented in the following chapter also have the task – in the wine industry – of leading interested parties and customers to corresponding websites in order to convey the desired content and generate conversions.

4.3.2 Online advertising in the (Austrian) wine industry

In general, an Austrian wine-growing enterprise can place advertising material, be it banners or advertorials (the paid form of an editorial contribution) on all websites that allow advertising. As it is not possible to display all websites due to their complexity, the online extensions of the Austrian wine magazines described in chapter 4.1.1 are presented below. In general, the wine-growing enterprise should take care to place its advertising messages online in an affine environment, even or especially if this is not done on an online medium specialised in wine.

Published data of the mentioned media are shown in table 3:

Medium	Newsletter subscribers	Costs of newsletter entry in EUR	Costs of online advertorial in EUR
Falstaff.com	72,000	1,490	1,590
Vinaria.at	22,000	no indication	no indication
Derwinzer.at	2,000	687	no indication
Alacarte.at	no indication	800 (Facebook entry)	1,490

Table 3: Austrian online media.
Source: Falstaff Verlags GmbH (2019), Vinaria (2020a), Der Winzer (2020), A la Carte (2020). Own representation.

Table 3 shows data on websites of selected Austrian wine portals. With 72,000 newsletter subscribers, Falstaff.com leads in this area, followed by Vinaria.at with 22,000. The costs for a newsletter entry amount to EUR 1,490 at Falstaff.com and EUR 687 at Derwinzer.at. Alacarte.at offers the possibility of booking online advertorials for EUR 1,490, and Falstaff.com charges EUR 1,590 for this. Falstaff.com and Vinaria.at also allow the placement of banner advertisements.

There is no official data from Austria's wine industry for the areas of search engine advertising and mobile as well as video advertising.

However, it is known from experience that some Austrian winegrowers are starting to incorporate online advertising into their communication strategy. Also, the tool "newsletter advertising" is already used by some wineries to inform existing customers about news, events and promotions.

The topic of online advertising was also addressed in a pre-study in the form of interviews[13]. The four experts questioned in this regard stated that the advertising of a winery and its products via online channels is highly recommended. Above all, advertising of the products via social media channels receives positive feedback and is recommended (Stoll, 2020). For this reason, in the specific case of the Austrian wine industry as well, a separate chapter is dedicated to the use of social media.

4.3.3 The use of social media in the (Austrian) wine industry

In order to substantiate these statements, studies from the (Austrian) wine industry on social media are presented below.

The Facebook presence of Austrian wineries

According to Inzinger (2018), Facebook picks up customers where they are dealing with things that actively interest them. Thus, this channel represents an optimal environment for suppliers who want to address new customers. Time is identified as a key factor, as appealing web feed needs good ideas on the one hand, but also constantly new content to generate fans and keep existing followers happy and encourage them to react. For this reason, Facebook is a way for

[13] 4 interviews with experts of the Austrian wine industry were conducted by the author in December 2019.

smaller wineries with a smaller marketing budget to tell stories about their business. The combination with an informative and functional website should not be overlooked, either. These two tools should form the basis for the customer to find the information he or she is looking for. Even if many fans speak for an exciting and well-populated Facebook presence, this does not automatically mean that the number of fans is a guarantee for success. According to the Digitalreport 2018, the authenticity of the content is important.

On the basis of the Austrian wineries listed in the Falstaff Wine Guides, manual research was carried out to find out which wineries use Facebook for their operations. The number of Facebook fans (as of April 30, 2018) was collected via an interface and evaluated on the basis of various criteria such as region, province, general information and average number of likes. The results are as follows:

- The use of Facebook by Austrian winegrowers cannot be regarded as being optimal.
- Nevertheless, Facebook often represents a low-priced alternative to usual marketing measures. Even a small budget is sufficient to place advertisements, with the help of which target groups can be precisely segmented and easily reached.
- With high-quality and up-to-date content, it is also possible to present the own company on an equal footing with larger competitors.
- Personal content, direct interaction with the fans and individual insights into the company offer added value. By doing so, the actual product is embedded within a story and offers customers a personal approach – and a pleasant incentive for buying.
- Some winemakers successfully use their own person to represent their brand (Inzinger, 2018).

Below, the Austrian wine-growing region of Burgenland is taken a closer look at.

The Facebook presence of wineries in the Austrian wine-growing region of Burgenland

The use of social networks such as Facebook or Instagram for customer care, information of interested parties or self-presentation is an integral part of marketing. According to the study conducted by the University of Applied Sciences Burgenland in 2015, one third of all businesses in Burgenland have a Facebook account and link this to the winery's website via an icon. At the time of the survey, the companies had a total of 103,000 Facebook friends, which is a valuable pool of contacts. As many as 44% of the wine-growing enterprises have more than 500 Facebook contacts, and a significantly lower proportion of 8% have more than 2,000 Facebook contacts (Wieschhoff, 2016, p.28ff).

Also, in the case of social media, it is essential not to disregard the competitors from abroad. Therefore, studies on the use of social media by Italian wineries as well as wineries from Germany, the USA, Australia and New Zealand are presented below.

Social media strategies in the Italian wine industry

In 2012, a study conducted by Begalli, Capitello and Codurri from the University of Verona deals with social media strategies in the Italian wine industry. It was assumed that social media activities have changed both the way organisations and brands interact with their consumers and the way business is done. The aim of the study was to evaluate the social media presence of six wineries, which differ in their geographical location, size, structure, age of operation and also their web marketing strategy, to find out how their organisational culture and access has been changed by communication via social media. The aim of the study was to find out which web strategies were used and to compare the results in terms of brand awareness.

- The first distinction was based on the social media channels used (the presence or absence of a Facebook and Twitter page, a YouTube channel, a FlickR page, apps, QR codes) and on the communication strategies implemented (goal and content of communication, strengths and weaknesses of communication and potential for improvement).
- The next step was to evaluate the online brand awareness. For this purpose, data from the website "HowSociable", which allows to identify brand visibility of each brand in 12 different social media, was used and evaluated.
- In general, it was found that for each of the six wineries studied, there is room for improvement when it comes to brand awareness on the Internet. With regard to the different channels, the following could be determined: Although Twitter achieved the highest values within the sample – this could be related to the textual limitation to 140 characters – Facebook delivered more constant figures, which could have something to do with a continuous online presence. YouTube is identified as the third most important channel.
- Only three of the six wineries studied have brand visibility in these three channels, but it is these three wineries that are market leaders in their segments and the largest in this sample.
- The most remarkable output of the study can be mentioned in relation to awareness on Twitter and Facebook generated by one of the wineries: although that winery is a small family business, the values achieved are higher than those of two major Italian wine brands. This proves that social media marketing can be very effective.

In general, it was found that the implementation of social media strategies differs greatly among the six wineries studied. Consistency between strategic goals and brand awareness in social media could not always be established and often the separate languages required for each channel were not taken into account. In general, there are different approaches in the Italian wine sector, which cannot be applied to the entire wine industry (Begalli, Capitello & Codurri, 2012, p.21-26).

The application of social media for consumer interaction in the wine sector in Germany, the USA, Australia and New Zealand

A study conducted in 2018 by Gergely Szolnoki of the University of Geisenheim on using social media for consumer interaction shows differences and similarities in the use of social media in the wine industries of Germany, the USA, Australia and New Zealand. The starting point of the study was the fact that social media has experienced enormous growth in recent years and that in 2016, more than 32% of the world's population was already using social media (Emarketer, 2016).

Wine is talked about online. This is partly due to many unknown wine brands around the world. In the USA for example, it is estimated that there are over 90,000 different wine brands (Degen & Thach, 2015). This fact, together with the fact that wine is an intimidating and complex product for many (Bruwer & Alant, 2009, p.235-257; Lockshin & Hall, 2010), allows both positive recommendations and negative criticism to roam around almost unfiltered in the social media and both forms can have business-relevant consequences.

The study examined the following research questions:

- Which communication channels are used by wineries in the countries surveyed?
- How comparable is the adoption level and importance of social media in the selected countries?
- Is there an Old World and a New World trend in the use of different social media platforms?
- Do wineries from Germany, the USA, New Zealand and Australia differ from each other in terms of the reason for using social media?
- Does the size of the winery influence the adoption of social media?

The results of the study can be summarised as follows:

- Personal communication is cited as the most used communication channel (Germany: 98%, Australia, New Zealand and USA 80%). German wineries primarily rely on traditional communication channels, such as personal contact, mail or telephone (over 80%). This is already the first difference between wineries in the New and Old World.

- The degree of use of social media as a communication channel is 87% in the US, 64% in Australia, 62% in New Zealand and 46% in Germany. These figures are also confirmed by the study of Remaud and Couderc (2006) and Resnick (2008), who state that wineries in the New World focus more on marketing and sales, while wineries in the Old World focus mainly on production and terroir[14]. These figures also mean that in Australia and New Zealand over 40% of the wineries do not use social media, while in Germany the figure is over 50%. Regarding the importance of social media, it was found that although the degree of social media usage is highest in the US, Australia is number one in terms of importance. Again, Germany comes in last, but in general, social media is an important tool for wineries in all nations.
- Facebook is by far the most widely used social media platform across all nations. According to previous studies, this platform is particularly important for millennials, as 30% of wine consumers in this age group obtain information about wines from Facebook (Higgins et al., 2016). Another study shows that 90% of wine drinkers use Facebook for more than 6 hours a week (Breslin, 2013). Other social media platforms such as Twitter, Instagram or Pinterest are used less – especially in Germany. This suggests that wineries in the Old World tend to focus on one platform rather than those in the New World, where wineries communicate through multiple platforms. These results could be related to the findings of Thach and Lease (2014), which found that the larger the number of social media channels used, the higher the return on investment, as it is possible to reach a larger number of potential customers simultaneously by using multiple platforms, but it is also more time-consuming.
- The workload used to process social media channels per week varies greatly between the countries. Almost a third of the wineries in the US spend more than 5 hours a week editing social media channels, and a third of the wineries in Australia and New Zealand spend at least 4 hours a week editing social media channels. Two thirds of German wineries report spending one to a maximum of two hours on social media. Increased time expenditure also results in greater financial outlay, which can be a problem for small wineries.
- The most common reason for using social media platforms is the possibility to communicate information about events, for PR purposes and to get in touch with customers. Other reasons

[14] Terroir includes the synthesis of location, climate and soil. Added to this comes the choice of variety, the vineyard management coupled with cellar management techniques, or the chosen vinification and maturation of the wine (Austrian Wine, 2020e).

are the acquisition of new customers and the promotion of the winery. In Germany, the flow of information and PR are the main reasons, in the other countries surveyed, communication with customers, acquisition of new customers, advertising and service are the main reasons. Also, the number of wineries that have not made a decision for themselves as to what they want to use social media for is interesting (Germany: 13%; New Zealand: 9%; Australia: 6% and USA: 5%).

- In terms of farm size and the use of social media, the following can be stated: the lowest use of social media can be found at farms in the 5-12 ha group, while very small farms (up to 5 ha) and medium-sized farms (12-44 ha) use this tool significantly more. Large companies (over 44 ha) have – almost without exception – integrated social media activities into their business philosophy – this applies to all of the countries surveyed.

Differences between the countries studied could be found in the degree of adoption as well as in the reasons for use and time invested in social media activities. The size of the wineries also has an influence on the social media behaviour of wineries. As assumed in previous studies, wineries with good social media presence can benefit from advantages such as increased sales volumes through word of mouth, customer loyalty and low-cost customer retention measures (Laverie et al., 2011; Leigon, 2011). Szolnoki assumes that many wineries do not yet enjoy these benefits because they are not yet present on social media. The surveyed wineries also state that they do not want to intensify their work in the social media sector. The reasons for this are thought to be that many wineries are already working several hours a week on their social media presence without knowing the return on investment, or some do not know how to use this tool most effectively as part of their marketing strategy. As a result, they are unwilling to intensify their benefits and could miss significant marketing opportunities (Szolnoki et al., 2018, p.109-119).

All studies presented in the online and especially social media sector have in common that, in general, wineries do not (yet) use the new communication tools for marketing purposes in the best possible way, although positive effects on customer acquisition and loyalty as well as brand awareness can be observed. These results are of great importance for Austrian wineries, both those that promise positive results and those that still show a lack of commitment in the area of web marketing, since only on the basis of comprehensive information can a course be set in the online marketing sector.

4.4 Conclusion of the general and specific analysis of the application of marketing communication tools in the wine industry

On the basis of the general analysis of the presented above-the-line, below-the-line and through-the-line marketing communication tools as well as the specific integration of these instruments in the Austrian and – in case of online examples – also international wine sector, discrepancies on the one hand and unused opportunities on the other hand could be identified, which were examined more closely in the course of the qualitative expert interviews and the quantitative end consumer survey.

This will now be explained in more detail. When it comes to above-the-line measures, the wine-specific figures from official statistics as well as own pre-studies (in case no official data from the wine industry were available), show partial discrepancies to general and superordinate data. For example, the general advertising statistics show that print advertising is growing, but the attractiveness of this advertising option is apparently declining in the wine industry, which in turn is in line with the fact that within the growing print sector the area of "trade magazines" is declining. The situation is similar with advertising on TV and radio, which is only possible and interesting for a small group of winegrowers but is generally experiencing growth in Austria. This means that wine-producing enterprises have to adapt promotional measures specifically to their economic sector.

The below-the-line sector with its tools events, trade fairs, promotion and awards already seems to be well used by wineries. In this case, however, it is important to check whether the application can be optimised and whether the full potential of these tools is already being exploited.

Although little data is available on the use of through-the-line tools by wineries in Austria, the studies presented clearly show that there is room for improvement in the entire wine sector, especially in online advertising and in the social media sector.

In order to scientifically substantiate these assumptions and to be able to draw conclusions that serve as a basis for recommendations, the two research projects carried out were based precisely on these findings.

In the following chapter, the applied research methods used are described and presented.

5 Applied empirical research methods to develop an adequate setting for small and medium-sized wineries

While chapters 3 and 4 were dedicated to the literature research on selected marketing communication tools in general and specifically in the wine industry, the empirical research methods applied will now be presented, the results of which – together with those of the literature research – will be used to eventually create a suitable communication model for small and medium-sized enterprises in the Austrian wine industry.

The first step of empirical research, described in chapter 5.1, shows the creation of an interview guideline for a qualitative research design. By means of expert interviews, assumptions about the status quo in the field of marketing and generally about the success of Austrian wineries are to be collected.
The second step aims to prove or disprove the assumptions made earlier with the help of quantitative research (see chapter 5.3), namely an end customer survey, in order to be able to draw conclusions about how Austrian winegrowers can achieve more success in marketing their products.

For this reason, the essential differences between qualitative and quantitative research should be explained: In the field of qualitative social research there are numerous survey and evaluation procedures, such as the expert interviews used in this case. What they have in common is an open approach to the research subject, which can change even during the research process. At the heart of the qualitative research process there is the desire to let the target group of interest have their say, if possible, in order to be able to comprehend the subjective viewpoint and thereby experience new facts. A possible analytical procedure following the data collection is the qualitative content analysis according to Mayring, which is applied in the course of this research and which will be described in more detail below.

Quantitative research, on the other hand, ideally follows a predetermined pattern, compared to qualitative research. For this purpose, theories and models of the object of research must already be available at the beginning of the research process. This is followed by the development of hypotheses that are tested in the research process, in this case an electronically sent questionnaire. The evaluation of the data is carried out using statistical methods, the degree of knowledge gained is verified by means of significance tests, and the findings are finally related to the theoretical model again and interpreted (Scheibler, n.d.).

In the course of this work, therefore, a qualitative research method (expert interview) will be combined with a form of quantitative research (questionnaire), with the overall objective of obtaining a picture of the whole situation that is as accurate and realistic as possible, in order to create a detailed communication model for enterprises in the Austrian wine industry.

5.1 Presentation of the expert interviews (qualitative research study)

In order to present an overall picture of the sector, experts of the Austrian wine industry were questioned in five interviews. The primary objective of the expert interviews was to obtain an initial evaluation of the marketing situation of enterprises in the Austrian wine industry.

To explain the research method in more detail, the term "expert" must be explained. Experts are people who have acquired their know-how through studies and professional practice over many years to such extent that their opinions can be helpful in revealing facts, solving problems or understanding a situation (expert. BusinessDictionary.com, 2020). Another definition is given by Gläser and Laudel (2010, p.12f.): They define experts as media through which knowledge about a certain subject is to be gained. The expert is not the object of research, but the witness. Experts have a special, sometimes exclusive, position within a social context.
In addition, to give interviews, experts need to cover necessary parameters as defined by Gorden in 1975: They have the desired information, they are able to give precise information, they were willing to share this information and they were available to conduct the interview (Gläser & Laudel, 2010, p.118). All interviewees were able to fulfil the above mentioned characteristics of an expert and therefore are qualified to give expert interviews. The selection of the interview partners was chosen in such a way that two experts represent wine-producing companies and three experts do not run their own wine business, but work in the field of "administration" in the Austrian wine industry in the broadest sense (training, purchasing, representation) and for this reason can take a different view on Austrian wineries, involving the entire industry.

The interviews conducted were based on guidelines, i.e. they were partially standardised (Ebster & Stalzer, 2003, p.212) – they were based on a questionnaire, as various topics were discussed and certain information had to be collected (Gläser & Laudel, 2010, p.111). Nevertheless, the

questionnaire was designed in such a way that the interview partners could also mention and discuss additional topics that had not been explicitly asked for.
The interviews were conducted with the following experts:

- Marcus Wieschhoff, head of the study programme "International Wine Marketing" at the University of Applied Sciences Burgenland and former buyer of wines and spirits at Metro Cash & Carry Austria.
- Pia Strehn, aspiring young winemaker from Burgenland and former employee of the wine retail chain Wein & Co.
- Stefan Tscheppe, Managing Director of the Winery of the Prince of Liechtenstein and former Managing Director of the Esterházy Wine Group.
- Christian Zechmeister, authorised signatory of Österreich Wein GmbH and former managing director of Wein Burgenland GmbH.
- Sabine Bauer-Wolf, part of the management team of Österreich Wein GmbH and head of the communications department.

The interviews were carried out in the period of December 2019 to January 2020. Four of the interviews were conducted in person, and one interview by e-mail due to time constraints by the expert.

The answers of the four personally conducted interviews were recorded and transcribed in the defined question groups. The email interview was added to the analysis. All answers were related to each other using a matrix. The qualitative analysis of the answers was carried out by means of a structured content analysis, which means that not only the frequency of certain elements was taken into account, but the given answers were evaluated according to certain criteria (Ebster and Stalzer, 2003, p.228 according to Mayring, 2000, p.472f.). These criteria were as follows:

- opinions on the status quo
- experts' recommendations for improvements
- other statements not explicitly mentioned in the questionnaire, but thematically appropriate

A pre-test was conducted to check the questions for meaning and understanding. Based on the feedback of the test persons, the questionnaire had been optimised before the interviews were conducted.

Questions on topics such as factors of success, marketing (communication) tools already in use in the Austrian wine sector, the position of marketing within enterprises in the Austrian wine industry and successful wineries and brands were answered by the experts. The groups of questions were chosen in such a way that the experts' answers could present a picture as detailed as possible of the status quo of the use of marketing communication tools in the Austrian wine industry. The entire questionnaire is reproduced in appendix A.

5.2 Limitations of the qualitative research study

When it comes to the limitations of the qualitative research study, the following points must be taken into account: Due to the subjective selection of the experts of the qualitative analysis, a distortion of the results may occur.

Furthermore, it cannot be ruled out that the experts may have a one-sided view on the survey topic due to their position.

When talking about the number of the expert interviews conducted, it has to be stated that five interviews can only reflect opinions and – in this case – support the quantitative research study, but not represent the Austrian wine industry on their own.

5.3 Presentation of the customer survey (quantitative research study)

The main objective of the quantitative research study, namely an online survey, which was conducted among wine consumers in Austria, was to find out whether there are any relations and correlations between wine purchases and wine consumption of the test persons and marketing communication activities of wine producers. Furthermore, the test persons were asked about their perception of trends and their awareness of selected wineries in the Austrian wine industry.

In this case, too, a pre-test was conducted among people, who were part of the target group, to check the questions for meaning and understanding. Based on the feedback from this test group, the questions were optimised before publication.

The online questionnaire, which was created using the programme “Question Star”, was distributed via Facebook, Instagram, e-mail and WhatsApp and 266 complete answers were handed in from December 2019 to March 2020. Subsequently, the evaluation of the questionnaire took place in April 2020 using the programme “Question Star” based on SPSS. Considering the number of 266 completed questionnaires, it can be stated that this number is considered representative for the behaviour of Austrian wine consumers. However, any limitations of the quantitative research study are discussed in the next chapter.

The online questionnaire dealt with questions on consumer behaviour, purchase criteria, product characteristics and names and brands in the Austrian wine industry. The selection of the question groups was made in such a way that a picture of the Austrian wine consumers could be presented that was as detailed and at the same time as holistic as possible. The entire questionnaire is reproduced in appendix A.

5.4 Limitations of the quantitative research study

There are three major points that need to be discussed when talking about limitations of the quantitative research study. First, although the sample of the quantitative research covering 266 completed questionnaires is considered representative for the Austrian wine sector, it could be expanded as results become clearer the more test persons participate in the study.

In addition, it is assumed that euphemistic answers might have been given when appropriate and thus, a slight misrepresentation of the results may be possible.

The third remark refers to the distribution of the test persons with regard to their stated level of education, which does not optimally reflect the Austrian population. While in 2017, 18.01% of the population had completed compulsory schools (Statistik Austria, 2019b), this group is not represented in the survey at all. The proportion of those who completed an apprenticeship was 34.15% of the population in 2017 (Statistik Austria, 2019b), but only 9.40% in this survey. In 2017, 14.70% of the population in Austria completed a vocational middle school (Statistik Austria, 2019b), but only 6.77% did so in this research survey. The figures for graduates of general secondary schools are comparable: In Austria in 2017, 6.21% (Statistik Austria, 2019b) completed a general secondary school, and 8.27% of the participants of the survey did so. The share of graduates of vocational secondary schools in Austria was 8.61% in 2017 (Statistik Austria, 2019b), but 13.91% in this survey. In 2017, 3.11% of Austrians completed a college or academy (Statistik Austria, 2019b), in this survey it is 10.53%. While 15.22% of the population in Austria had a university or college degree in 2017 (Statistik Austria, 2019b), 51.13% of the respondents state that this is the highest level of education. For this reason, statements made cannot be transferred to the entire Austrian population. In a follow-up study, these characteristics of the population should be taken into account.

6 Results and discussion of the research studies

After the prerequisites for qualitative and quantitative research, the procedure and the key data and questions were described in the previous section, the next chapter is now dedicated to the results of the research conducted. In addition to the presentation of the results, they are also analysed specifically with regard to their importance for small and medium-sized enterprises in the Austrian wine industry.

In the following, the experts' answers are presented in summary form. The detailed description of the answers per expert can be found in appendix A.

6.1 Results and discussion of the expert interviews (qualitative research study)

The aim of the qualitative research, the expert interviews, was to gain insight into the status quo of the Austrian wine industry in order to be able to derive recommendations for action after linking them to the results of the consumer survey. Differences in perception are also to be highlighted and discussed.
It is striking that the five experts, although working in different areas within the Austrian wine industry, hold the same or at least similar opinions on many issues. On the one hand, this can be attributed to the small size of the Austrian wine industry, but on the other hand, it also shows that players within this economic sector are very much involved with the sector and also identify with it. The tapping of common sources (state institutions for the wine industry) can also be a reason for the uniform picture. This phenomenon is referred to as “industry recipe” in strategic management.

Part A Factors of success

Question number 1: In your opinion, how can success of Austrian winegrowers/wineries be measured?

The experts consider accounting key figures, demographic development, risk minimization in the customer segments and the degree of awareness to be the most important measuring instruments for success in the Austrian wine industry. In concrete terms, this means for Austrian winegrowers that, on the one hand, the accounting key figures must be known (keywords: sales, turnover, yield, production and personnel costs), but on the other hand, the customer segments must also be known very well. Winemakers are advised to examine their customer base in terms of both order volume and demographic data and, if necessary, to take action to minimise risks. For example, if the winery is dependent on one large customer, it is advisable to consider the loss of that customer. Similarly, winegrowers should take care of their customer base and expand their segment if necessary, for example if it is characterized by a high average age. The degree of awareness is also regarded as a measure of success by the experts. On the one hand, this can be determined by market research, but in practice this determination is cost-intensive. Therefore, it is advisable to use marketing communication tools to increase the level of awareness of the company.

Question number 2: In your opinion, what should winegrowers and wineries do to achieve maximum success?

The experts recommend showing presence and taking the brand seriously. In practice, showing presence means filling communication channels with content. These channels should be well selected by the company and should be operated in a planned way. This means, for example, if a winery decides to communicate via social media, the information must be adapted to the channel and be published at the appropriate frequency. This applies to all communication channels in the same way and requires an overview plan that combines all the activities of the winery. In addition, this plan should answer the following questions: Which information is published, to what extent, where and when? To support the development and awareness of a brand, it is advisable to coordinate all activities accordingly.

The basis for all activities should always be a comprehensive analysis of the operation and planning in line with the objectives. This is to be implemented for companies of all sizes.

Part B Marketing communication tools already in use in the Austrian wine sector

Question number 3: In your opinion, which marketing communication tools are already successfully used by Austrian winegrowers and wineries?

The experts give good marks to Austrian wineries in the areas of participation in events and consumer fairs, attendance at wine awards, as well as farm-gate sales, sales promotions and – in some cases – the use of social media.

For the wineries, this means that they must not let up in these areas, but rather expand these tracks.

However, there is a need to catch up in the online communication sector, in the field of B2B trade fairs and in brand management.

For Austrian wineries, this means that all areas of online communication should be improved: The Internet presence including the winery's website, e-mail correspondence with customers and communication via all social media channels. Social media channels in particular are not yet perceived as what they actually are, namely two-way channels of communication that require continuous support.

In contrast to end-customer fairs, B2B fairs require detailed, longer preparation time tailored to B2B customers and more extensive post-processing.

For Austrian companies this means in specific terms that preparation for and follow-up after B2B trade fairs must be taken seriously and must be carried out precisely. The winegrower must know which customers he expects and what they specifically require.

There is also a need to catch up in the area of brand management.

This means for Austrian winegrowers that it is recommended to plan all activities concerning the sales and communication of the brand precisely, both in terms of content and time.

Question number 4: How important would you consider the correct use of the following marketing communication tools in the Austrian wine industry? (Functioning and up-to-date website | social media presence | participation in fairs and events | being an organiser of events yourself | presence in the media through advertisements and/or editorial contribution | participation in awards)

When it comes to the importance of the correct use of marketing communication tools, the first priority undoubtedly is a mobile-optimised website as a hub of information and communication.

For Austrian businesses this means that all the information the customers are looking for on the website must be up-to-date and available by just a few clicks. This concerns information about wines, events, prices, but also brief information about the company and its philosophy.

The use of social media channels can also contribute to success and has the potential to reach many people in a short period of time.
For companies this means that the first step is to clarify whether social media and, if so, which channels fit the philosophy of the company. Questions such as “who can be reached where?” are essential and must be clarified in advance. The next step is to identify whether resources are available to service the channels regularly - continuous support must be available. And finally, a content plan must also be created in this area of communication.

Trade fairs and events are also recommendable tools that can contribute to the success of the business, for wineries being both participants and organisers.
In this case, companies should proceed selectively in order to take part in the trade fairs and events that suit their business, as participation is usually accompanied by costs and the deployment of personnel and time. Only an optimal presentation has a positive effect.

Being an organiser of events is mentioned to have a positive effect on customer loyalty. For companies, however, this means a great deal of effort, which must be weighed up in advance. Therefore, comprehensive planning is essential.

When it comes to the use of paid advertising, companies should consider very carefully whether these costs are justified. Advertisements are only recommended from a frequency of at least four placements and in co-operation with a sales partner. However, press work in the sense of editorial contributions is highly recommended for Austrian companies. It is important to present exciting stories in press releases and make them available to the press.

Awards and wine evaluations should be used by wineries – especially as a tool for internal communication, to offer existing customers further incentives for buying wines and to give trade partners more reasons for resale. For businesses, this means that those awards and evaluations should be chosen that match the style of their wines and the philosophy of their business. A positive result should definitely be communicated through all available channels.

Question number 5: In your opinion, are there any other parameters ("black box") that can clearly contribute to success? If so, which ones?

The human being should not be underestimated in the wine business. In particular, this parameter cannot be pigeonholed and offers enormous opportunities, but also risks.

On the one hand, the personality of the winemaker or the person in charge of the winery must be mentioned, and on the other hand, all the customers, who always act as ambassadors of the winery should not be forgotten, either. For the winery, this fact means that it should be clearly defined who and how this person or persons appear to the outside world. The use of experts, especially in the form of advice, should be considered.

Part C The position of marketing within enterprises in the Austrian wine industry

Question number 6: How do you assess the position of "marketing" of non-owner-managed wineries? / Question number 7: In your opinion, are cooperatives and wineries that are not owner-managed disadvantaged in terms of marketing? And if so, why?

The experts give a positive assessment to the position of marketing for all forms of wineries, even if non-owner-managed businesses seem to be preferred, since all positions can be filled independently and with professionals.

For companies in the Austrian wine industry this means in specific terms that marketing (communication) must be taken seriously and used in a targeted manner – even in the case of a family-run winery. This requires the development of a marketing strategy adapted to the structure of the winery, which emphasizes the philosophy of the winery and communicates all USPs through the appropriate channels.

In the case of non-owner-managed wineries, the brand should be placed in the centre of communication and a figurehead of the winery should be defined. In the case of owner-managed wineries, the winemaker should be aware of his position as a figurehead and the link between the brand and himself and take use of this fact accordingly.

Part D Current trends in the Austrian wine industry

Question number 8: What are the current trends in the Austrian wine industry, and should winegrowers take them up?

When identifying trends, it can be deduced on the basis of the statements of the experts for Austrian wineries that – regardless of the trend per se – the most important question is always whether the trend goes with the philosophy of the winery. If this is affirmed, then the trend must be taken seriously, and the new products must be seen as a full complement to the product range.

Part E Successful wineries and strong brands in the Austrian wine sector

Question number 9: Which five Austrian winemakers are most successful in your opinion and why? / Question number 10: Which Austrian winery has, in your opinion, the strongest brand and why?

The questions about the most successful wineries in Austria and about the strongest brand in the Austrian wine industry were answered – despite different mentions by the experts – with common characteristics and approaches that can be applied to all companies in the Austrian wine industry: Knowledge of their own operations, understanding of the market and comprehensive support of all customer segments are core issues of every successful winery. The development and support of the own brand are also essential. Continuous evaluation of the own performance and resources as well as visions and objectives have been identified as being very important, as well as presence, good wine ratings, a high position in the reseller network, continuous development and the achievement of good sales prices.

All these parts can make a significant contribution to economic success and therefore, it is highly recommended to deal with all the mentioned partial aspects in detail and to take action according to the own vision and set goals.

6.2 Results and discussion of the customer survey (quantitative research study)

The aim of the quantitative research – the survey among Austrian wine drinkers – was to gain insight into consumer behaviour with regard to buying wine, information search behaviour and industry knowledge in order to derive relevant information for wineries.

6.2.1 Descriptive analysis and relations

In the following, first, the results of the quantitative research study and their descriptive analysis are presented within their question parts A to E. In a second step, cross tabulations were calculated and described to show whether there are relations between individual parameters and in order to analyse the direct impact of marketing communication tools on the purchasing behaviour of the respondents and the awareness of winemakers. Spearman correlations were applied to parameters, which are ordinally scaled, to show any significant correlations. In case of statistical significance, these are also listed at the appropriate questions.

For selected parameters, the precisely described auxiliary tables (tables 19-61) needed for the calculation can be found in appendix A, in case a relation was found.

A Consumer behaviour

Question number 1: Where and how often do you buy wine?

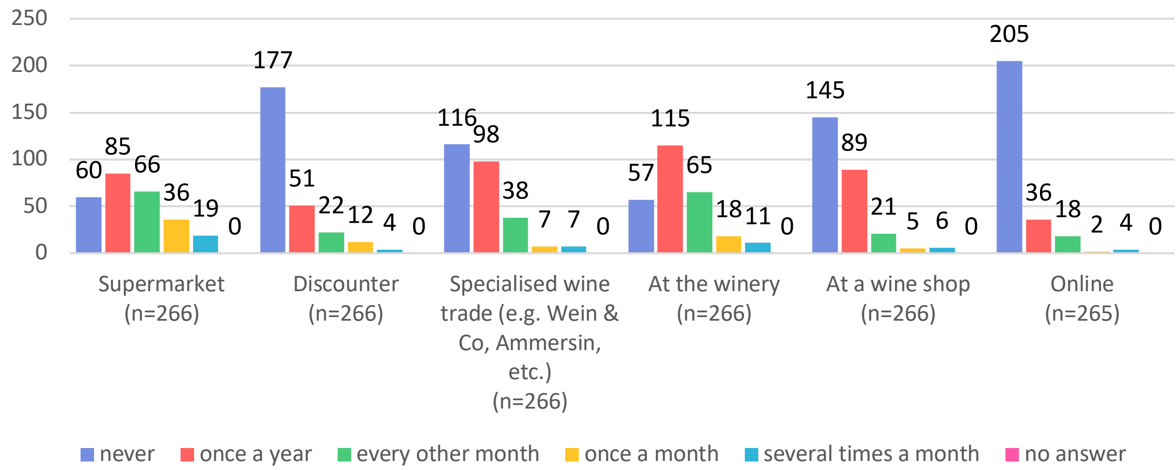

Figure 24: Shopping locations and frequency of wine purchases.
Source: Own survey

Figure 24 shows the shopping locations and the frequency of wine purchases. The high numbers of "never" are striking when it comes to wine purchases online (205 mentions), at discount stores (177 mentions) and wine shops (145 mentions). Especially the channels "online" and "discounters" are experiencing an upswing right now, according to literature analysis. Therefore, these figures are contradictory to the statistics mentioned in the literature reference. Most frequently (several times a month) the test persons buy wine at the supermarket (19 entries), followed by buying directly from the winery (11 entries). In third place for several wine purchases a month there is the specialised wine trade, mentioned by 7 respondents. When it comes to wine purchases once a month, the supermarket again is in first place (36 mentions), followed by purchases at the winery with 18 mentions and at the discount store with 12 mentions. Every other month, the test persons buy their wines primarily at the supermarket (66 mentions), followed by purchases at the winery (65 mentions) and in the specialised wine trade (38 mentions). When it comes to buying wine once a year, purchases from wineries are in first place (115 mentions), followed by specialised wine retailers (98 mentions) and wine shops (89 mentions).

To summarize the evaluation of the first question, the output for Austrian winegrowers is that if it is in line with the philosophy of the company, the possibility of distributing wines via all channels in Austria is given as wine purchases are made via all channels.

Question 2: If you buy wines online, where do you do it?

Question 2 was answered with a total of 113 mentions. The respondents most frequently named the following online sources of supply: Directly on the website of the winery (23 mentions), Interspar Weinwelt and Wein&Co Online (14 mentions each), Vinorama (6 mentions), and Vincampo (4 mentions). Other online sources of supply, each mentioned twice, are Amazon, Giordano, Proidee, Samovino, Vinatis, Vinexus, Weinskandal and Wine in Black.

The importance of the website as a sales channel can be seen in the respondents' mentions of where purchases are made online – in this case, the websites of wineries are clearly in first place, followed by websites of wine retailers, which, in a slightly different order, correspond exactly with the wine retailers listed in figure 13.

Question 3: Has your drinking behaviour changed in recent years and if so, how?

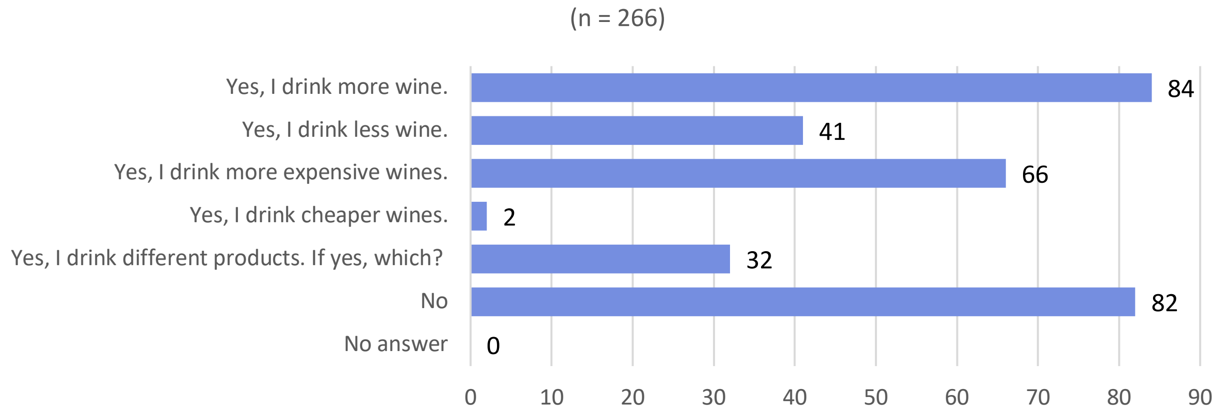

Figure 25: Changes in the drinking behaviour of the test persons.
Source: Own survey

As shown in figure 25, 84 persons (31.58%) state that their drinking behaviour has changed in recent years to the effect that they now consume more wine. 41 persons drink less wine than in the last few years, corresponding to 15.41%. 66 (24.81%) state that they currently drink more expensive wines than just a few years ago and 2 respondents (0.75%) say that they drink cheaper wines now. 12.03% of the respondents (32 persons) now drink other products, such as beer (13 statements), spirits and cocktails (9 statements) and non-alcoholic beverages (7 statements). No change in their drinking behaviour is reported by 30.83% of the respondents (82 persons).

The information on the drinking behaviour of the test persons correlates with the information examined by literature research, according to which the per capita consumption of wine in Austria has levelled off between 27.8 and 26.7 litres since 2015 (figure 7). Almost equal proportions of the test persons state that they did not perceive any changes in their drinking behaviour and, on the other hand, that they drink more wine. This means for the winegrowers, that, in the current situation, no major changes in drinking behaviour are to be expected, but potential for the sale of more expensive wines is shown.

Relation between shopping locations and changes of drinking behaviour

Table 4 shows the relation between the shopping locations for wine and the change in drinking behaviour of the respondents:

Shopping location	Change in drinking behaviour
Supermarket	
Discounter	
Specialised wine trade	
Winery	X
Wine shop	
Online	

Legend: X indicates that a relation exists

Table 4: Relation between shopping locations and change in drinking behaviour.
Source: Own survey

While no relation between the shopping locations supermarket, discounter, specialised wine trade, wine shop and online[15] could be found, a relation, that is statistically significant, between the shopping location "winery" and the changes in the drinking behaviour of the respondents could be established (table 19).

Question 4: Do you inform yourself about the wines you consume and if so, how?

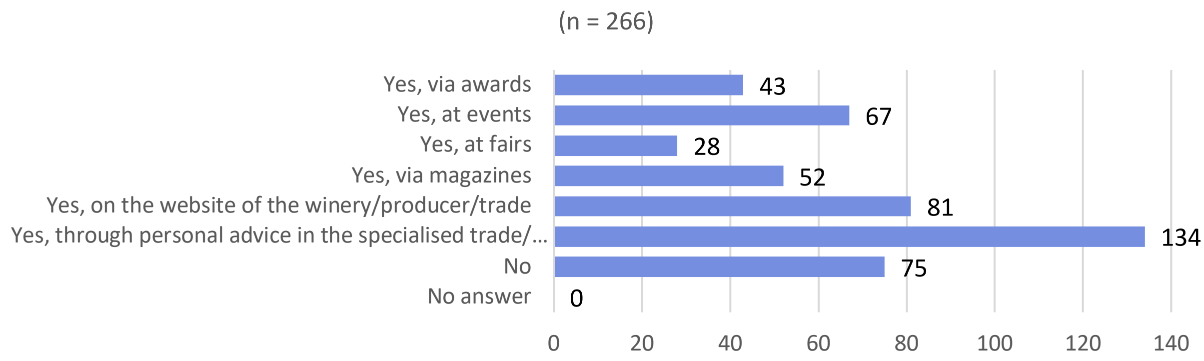

Figure 26: Sources of information on wines consumed.
Source: Own survey

When asked whether the test persons inform themselves about the wines they consume and how they do so, 134 persons (50.38%) state that they do so through personal advice at wine shops or wineries. 81 persons (30.45%) obtain information on the website of the winery or retailer. In third place among sources of information there are wine-related events with 67 people (25.19%) naming them, followed by wine magazines (52 mentions / 19.55%). 43 people (16.17%) obtain information about wines via wine awards, and 28 test persons (10.53%) use trade fair visits to

[15] supermarket: Chi^2: 25.962, df: 20, p-value: 0.167 / discounter: Chi^2: 12.8, df: 20, p-value: 0.886 / specialised wine trade: Chi^2: 19.464, df: 20, p-value: 0.492 / wine shop: Chi^2: 18.375, df: 20, p-value: 0.563 / online: Chi^2: 10.57, df: 20, p-value: 0.957

obtain information about their wines. 75 test persons (28.20%) state that they do not look for information about the wines they consume.

The analysis of the procurement of information about wines holds great possibilities to companies in the Austrian wine industry. The results imply that the wineries have to work in the relevant channels in which information is sought to ensure that customers can find the information they are looking for. As recommendations, the winery's website and events are cited as the three most important sources of information when looking for wines, for a winery, this means that more emphasis should be placed on local advice, its own website and events.

Relation between the information-seeking behaviour of the respondents about wines and the shopping locations for wine

The aim was also to find out whether there was a relation between the respondents' information-seeking behaviour about wines and the defined shopping locations (depicted in table 5):

Shopping location	Information about wines
Supermarket	
Discounter	
Specialised wine trade	X
Winery	X
Wine shop	X
Online	

Legend: X indicates that a relation exists

Table 5: Relation between shopping locations and information-seeking behaviour about wines. Source: Own survey

While there is no relation between wine purchases at supermarkets, discounters and online and the procurement of information about wines[16], relations could be found between the information-seeking behaviour about wines and the shopping locations specialised wine trade (table 20), winery (table 21) and wine shop (table 22). The information channels "recommendation by personnel", "events" and "website" are particularly pronounced among

[16] supermarket: Chi^2: 15,512, df: 24, p-value: 0.905 / discounter: Chi^2: 11,924, df: 24, p-value: 0.981 / online: Chi^2: 32,358, df: 24, p-value: 0.118

those test persons who state that they buy in the respective shopping outlets and inform themselves about wines.

Question 5: Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?

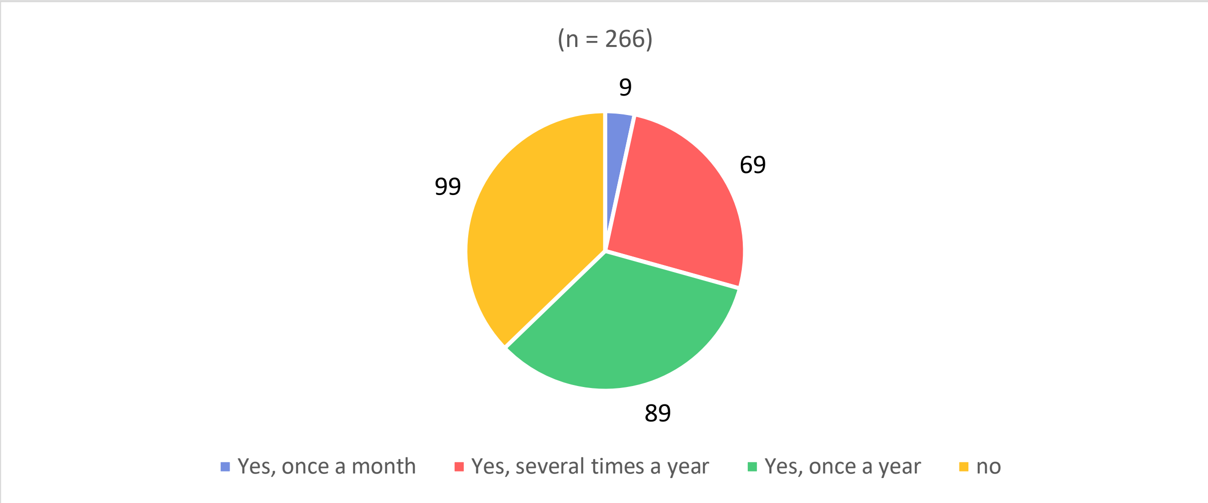

Figure 27: Attendance at wine events.
Source: Own survey

Figure 27 shows the distribution of the number of events related to wine attended by the test persons. While 99 respondents (37.22%) state that they do not attend wine-related events, 89 people (33.46%) indicate that they attend wine events once a year. 69 respondents (25.94%) visit wine-related events several times a year and 9 people (3.38%) even once a month.

Events are an increasingly important communication and sales tool in the wine industry. The results imply that wineries as organisers and exhibitors, should use this channel to exploit the positive effects of events, such as increasing awareness, but also sales.

Relation between the attendance at wine events and shopping locations for wine

The next step was to find out whether there was a relation between the selected shopping locations for wine and the attendance at wine-related events (depicted in table 6).

Shopping location	Attendance at wine events
Supermarket	
Discounter	
Specialised wine trade	X, C
Winery	X, C
Wine shop	X, C
Online	X, C

Legend: X indicates that a relation exists; C indicates that there is a correlation

Table 6: Relation between shopping locations and attendance at wine events.
Source: Own survey

While there is no relation between the shopping locations supermarket and discounter and the attendance at wine-related events[17], a significant relation was found between buying in the specialised wine trade, at wineries and wine shops and the attendance at events (tables 23, 24 and 25). A relation was also found between online wine purchasing and the attendance at wine-related events (table 26). Thus, it can be said that there is a relation between people who attend wine-related events and people who purchase their wines in the above-mentioned shopping outlets.

Since the number of purchases in the various outlets and the number of event visits are ordinally scaled variables, the Spearman's Rank Correlation was applied to find out whether there is a correlation between these variables.
A negative correlation, which is statistically significant, could be identified between the attendance at wine-related events and the shopping locations “specialised wine trade” (table 27), “winery” (table 28), “wine shop” (table 29) and “online” (table 30). This means that the less often purchases are made at these shopping locations, the less often wine-related events are attended. If no events are attended, no purchases are made at these locations.

[17] supermarket: Chi^2: 9,755, df: 12, p-value: 0.637 / discounter: Chi^2: 11,293, df: 12, p-value: 0.504

Question 6: Do you attend wine fairs?

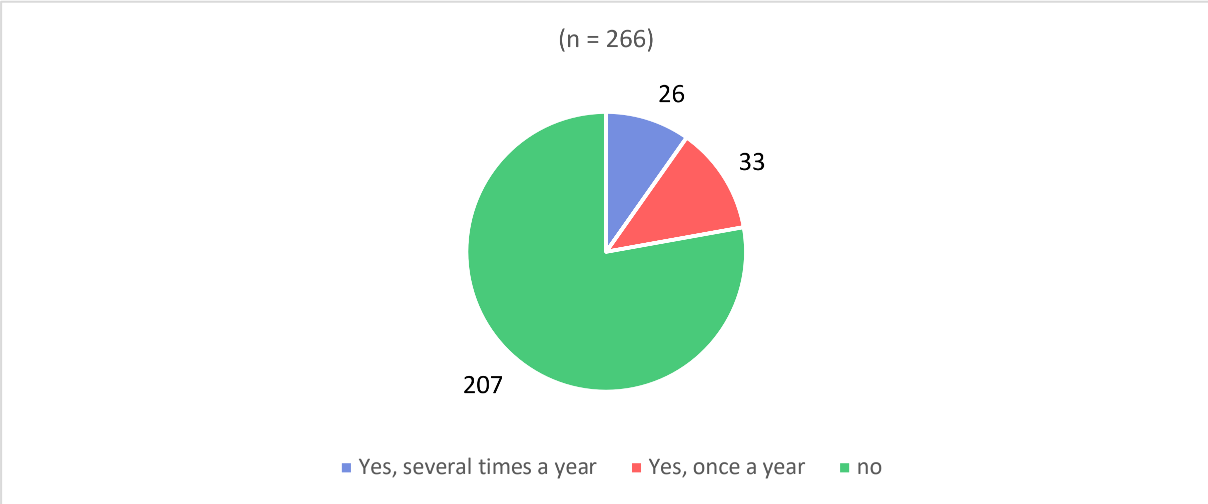

Figure 28: Attendance at wine fairs.
Source: Own survey

Figure 28 shows the frequency of visits to wine fairs by the test persons. While the majority of the respondents (207 persons / 77.82%) state that they never visit a wine fair, 33 persons (12.41%) indicate that they do so once a year, and 26 (9.77%) even visit wine fairs several times a year.

While more than 60% of the respondents attend wine-related events, only 22.18% of the test persons state that they visit wine fairs. It should be mentioned that in this case, it is spoken of B2C trade fairs only. The most important thing is to differentiate between the target groups of trade fairs, i.e. whether it is an end customer trade fair or a B2B trade fair. The latter were analysed in the previous chapter. It is now worth considering whether wineries should continue to participate in B2C fairs or whether this investment could be better used in other areas.

Relation between the attendance at wine fairs and selected shopping locations for wine

Table 7 shows the relation between the selected shopping locations for wine and the attendance at wine fairs.

Shopping location	Attendance at wine fairs
Supermarket	
Discounter	
Specialised wine trade	X, C
Winery	C
Wine shop	X, C
Online	X, C

Legend: X indicates that a relation exists; C indicates that there is a correlation

Table 7: Relation between shopping locations and attendance at wine fairs.
Source: Own survey

While there is no relation between the shopping locations supermarket, discounter and winery[18] and the visits of wine fairs by the test persons, a significant relation can be found between the test persons' visits to wine fairs and their purchases in the specialised wine trade (table 31), at a wine shop (table 32) and online (table 33).

As with events, since the number of purchases in the various outlets and the number of trade fair visits are ordinally scaled variables, the Spearman's Rank Correlation was applied to find out whether there is a correlation between these variables. In this case, a negative correlation, which is statistically significant, could be identified between the attendance at wine fairs and the shopping locations “specialised wine trade” (table 34), “winery” (table 35), “wine shop” (table 36) and “online” (table 37).

Question 7: Do you inform yourself about certain winemakers/wineries and if so, via which channels?

[18] supermarket: Chi^2: 8,658, df: 8, p-value: 0.372 / discounter: Chi^2: 14,631, df: 8, p-value: 0.067 / winery: Chi^2: 14,253, df: 8, p-value: 0.075

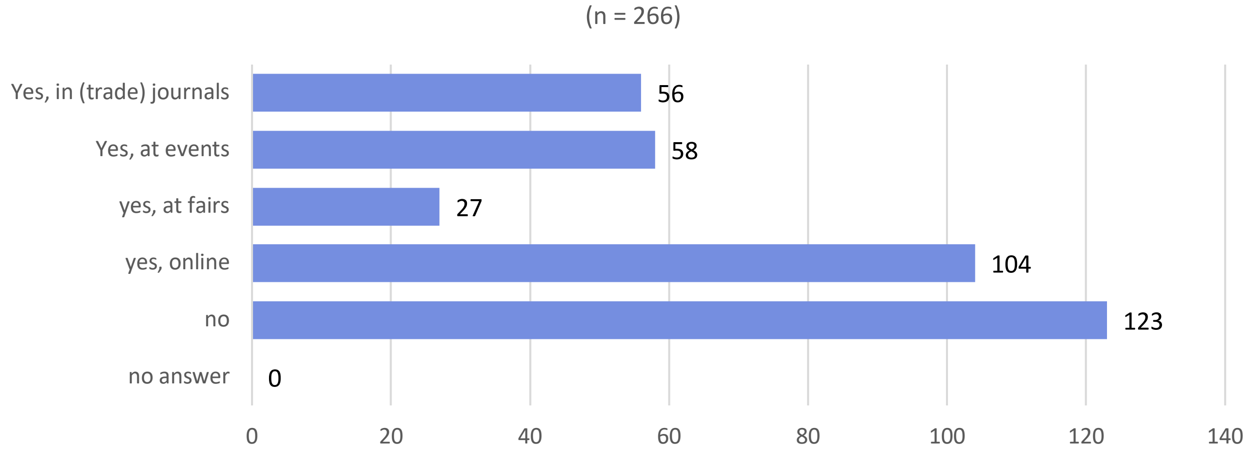

Figure 29: Sources of information about winegrowers/wineries.
Source: Own survey

Figure 29 shows the channels used by the respondents to collect information about winegrowers and wineries. The online channel is mentioned in the first place. 104 persons (39.10%) inform themselves about wineries and winegrowers there. 58 respondents (21.80%) inform themselves at events and 56 (21.05%) via magazines. 27 persons (10.15%) use trade fairs to gather information about winemakers or wineries. 123 persons (46.24%) state that they do not inform themselves about wineries and winegrowers.

The analysis of the procurement of information about wineries and winegrowers offers great opportunities to Austrian winegrowers. More than half of the respondents inform themselves about the wineries whose wines they consume. As with the procurement of information about wines, also in this case, this means that the wineries have to operate in the appropriate channels where information is sought to ensure that customers can find the information they are looking for. The online channel, events and magazines play the biggest role in finding information about wineries and winemakers. For a winery, this means that more emphasis should be placed on its own website and events. Furthermore, press work should be done to provide journalists with relevant information about the winery and – in the best case – be mentioned in magazines. Of course, there is also the possibility to place advertisements in wine related journals, but wineries must be aware of the budgetary commitment. In order to inform the customers in the best possible way, the use of different media should definitely be coordinated.

Relation between selected shopping locations and the procurement of information about wineries

Table 8 shows the relation between selected shopping locations for wine and the information-seeking behaviour about wineries.

Shopping location	Information about wineries
Supermarket	
Discounter	
Specialised wine trade	X
Winery	X
Wine shop	X
Online	X

Legend: X indicates that a relation exists

Table 8: Relation between shopping locations and information-seeking behaviour about wineries. Source: Own survey

While there is no relation between wine purchases at supermarkets and discounters and the procurement of information about wineries[19], relations between the information-seeking behaviour about wineries and the shopping locations specialised wine trade (table 38), winery (table 39), wine shop (table 40) and online (table 41) could be shown. The most important sources for information are “online”, “events” and “(trade) journals”.

Question 8: Which winegrowers/wineries do you follow on social media and/or from which have you subscribed to newsletters?

148 respondents indicate a total of 199 different winemakers they follow on social media or subscribe to newsletters. The following winemakers were named according to frequency: Scheiblhofer (14), Aumann (10), Hillinger (8), Esterházy (5), Domäne Wachau, Johanneshof Reinisch, K+K Kirnbauer, Kraft (4 each), Alphart, Heinrich, Sabathi, Schwertführer, Sommer (3 each), Allram, Auer, Bründlmayer, Gabriel, Gager, Ganneshofer, Hagn, Jurtschitsch, Knoll, Kollwentz, Mayer am Pfarrplatz, Nigl, Pedalones, Polz, Salzl, Schagl, Schauer, Silvia Heinrich, Stagard, Strehn, Tement and Wieninger (2 each).

When it comes to social media followers and newsletter subscribers, the following information can be given: Although the number of respondents who follow wineries on social media and /

[19] supermarket: Chi^2: 10.406, df: 16, p-value: 0.845 / discounter: Chi^2: 10.87, df: 16, p-value: 0.817

or have subscribed to newsletters seems relatively small (89 respondents), the analysis shows that interested wine consumers often follow several wineries (a total of 199 wineries). For wineries, these channels mean investments in time and human resources on the one hand, but also free opportunities to provide interested parties with information about the winery, upcoming activities and events and special offers. Therefore, these channels should never be underestimated and be used by wineries that have defined growth as their business objective.

B Purchase criteria

Question 9: How important to you when buying wine...

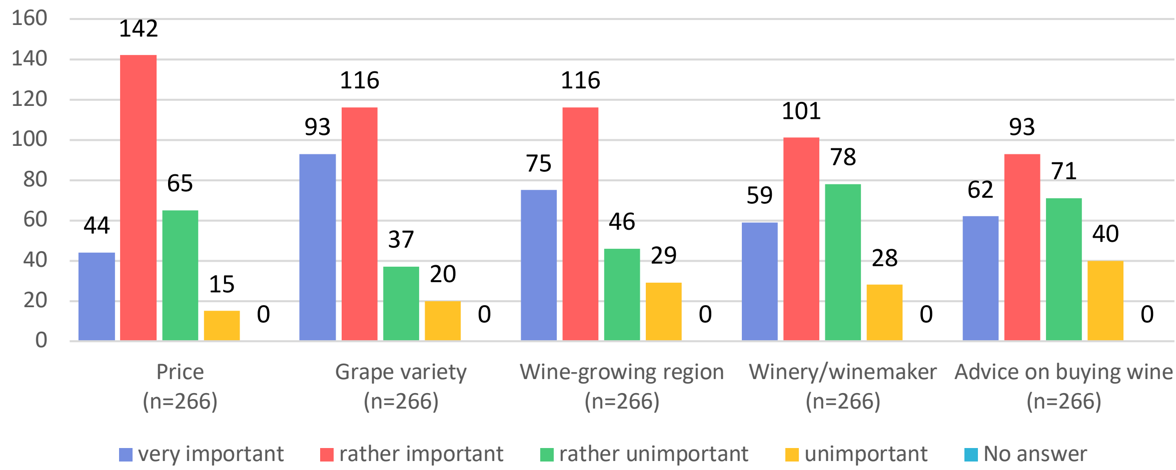

Figure 30: Parameters that play a role when buying wine.
Source: Own survey

Figure 30 shows various parameters that play a role when buying wine and indicates the importance for the test persons.

Price: 44 respondents (16.54%) state that the price is very important, and 142 respondents (53.38%) rather important. 65 respondents (24.44%) consider the price rather unimportant, and 15 (5.64%) unimportant.

Grape variety: When buying wine, the grape variety plays a very important role to 93 respondents (34.96%), and a rather important one to 116 (43.61%). 37 persons (13.91%) consider the grape variety rather unimportant and 20 (7.52%) unimportant.

Wine-growing region: 75 respondents (28.20%) state that the wine growing region plays a very important role when buying wine, and 116 (43.61%) state that it plays a rather important one.

46 persons (17.29%) consider the wine-growing region to be rather unimportant and 29 (10.90%) to be unimportant.

Winery /winegrower: The winery and/or the wine grower play(s) a very important role for 59 respondents (22.18%), and a rather important one for 101 (37.97%). 78 persons (29.32%) consider the parameters "winery and/or winegrower" to be rather unimportant, and 28 (10.53%) consider them to be unimportant.

Advice when buying wine: Advice when buying wine is very important to 62 persons (23.31%), and it is rather important to 93 (34.96%). 71 persons (26.69%) consider advice when buying wine rather unimportant and 40 (15.04%) do not consider it important at all.

With regard to the parameters that play a role when buying wines, no uniform picture can be drawn at first glance. It is a fact that most of the test persons rank all the parameters asked for "rather important". This means that the price, as well as the grape variety, the region, the winery or the winegrower and also advice when buying wine play a role. For the winemaker, this means that all parameters should be well thought through and clearly positioned in the communication.

Relation between selected shopping locations and important parameters for buying wine
The relation between selected shopping locations and important parameter for buying wines is depicted in table 9.

Shopping Location	Price	Grape variety	Wine growing region	Winery	Advice
Supermarket	X				
Discounter					
Specialised wine trade					X
Winery		X		X	X
Wine shop					X
Online		X			

Legend: X indicates that a relation exists

Table 9: Relation between shopping locations and important parameters for buying wines.
Source: Own survey

While a statistically significant relation could be found between the shopping location supermarket and the parameter price (table 42), no relation could be found to the parameters grape variety, wine-growing region, winery and advice[20]. In the case of the shopping location discounter[21], no statistically significant relation could be found with any of the mentioned parameters that are important for the purchase.

A statistically significant relation could be found between the parameter advice and the purchase in specialised wine trade (table 43) and the wine shop (table 47), while all other parameters show no relation to these purchase channels[22]. A different picture emerges from the analysis of the shopping location winery: in this case, statistically significant relations were found for the parameters grape variety (table 44), winery/winemaker (table 45) and advice (table 46). No relation could be found between the shopping channel winery and the parameters price and wine-growing region[23].

In the case of the online shopping channel, a statistically significant relation was found for the parameter grape variety (table 48), but for none of the other parameters mentioned[24].

Question 10: In which price range are most wines you buy?

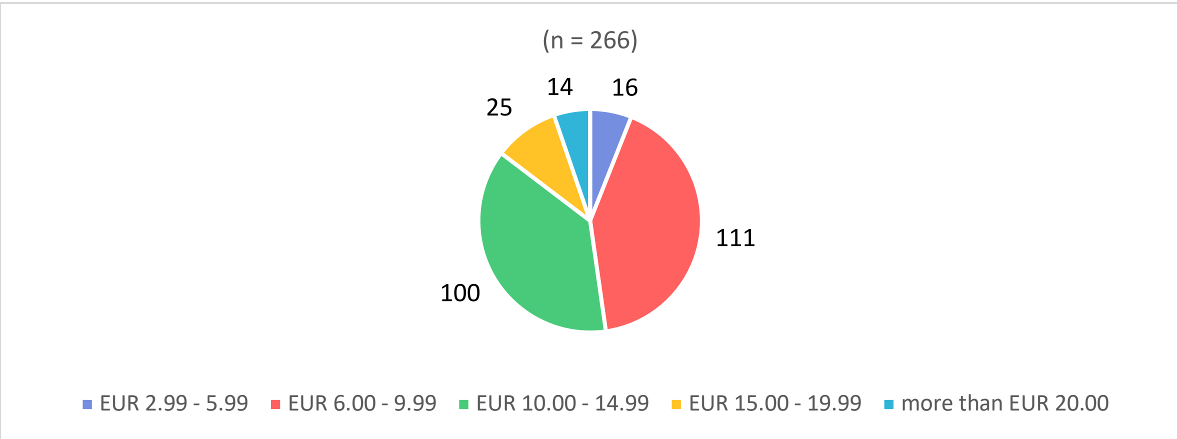

Figure 31: Price categories.
Source: Own survey

[20] grape variety: Chi^2: 11.946, df: 12, p-value: 0.45 / wine-growing region: Chi^2: 6.272, df: 12, p-value: 0.902 winery: Chi^2: 10.879, df: 12, p-value: 0.539 /advice: Chi^2: 19.198, df: 12, p-value: 0.084

[21] price: Chi^2: 17.967, df: 12, p-value: 0.117 / grape variety: Chi^2: 9.912, df: 12, p-value: 0.624 /wine-growing region: Chi^2: 7.762, df: 12, p-value: 0.803 /winery: Chi^2: 15.723, df: 12, p-value: 0.204 / advice: Chi^2: 14.994, df: 12, p-value: 0.242

[22] specialised wine trade: price: Chi^2: 9.567, df: 12, p-value: 0.654 /grape variety: Chi^2: 20.614, df: 12, p-value: 0.056 / wine-growing region: Chi^2: 16.317, df: 12, p-value: 0.177/ winery: Chi^2: 17.549, df: 12, p-value: 0.13
wine shop: price: Chi^2: 7.638, df: 12, p-value: 0.813/ grape variety: Chi^2: 10.596, df: 12, p-value: 0.564/ wine-growing region: Chi^2: 16.148, df: 12, p-value: 0.185/ winery: Chi^2: 15.194, df: 12, p-value: 0.231

[23] price: Chi^2: 15.558, df: 12, p-value: 0.212/ wine-growing region: Chi^2: 18.824, df: 12, p-value: 0.093

[24] price: Chi^2: 9.401, df: 12, p-value: 0.668/ wine-growing region: Chi^2: 15.574, df: 12, p-value: 0.212/ winery: Chi^2: 14.581, df: 12, p-value: 0.265/ advice: Chi^2: 20.23, df: 12, p-value: 0.063

Figure 31 shows the price categories in which most of the wines bought by the test persons are located. In first place there is the price sector of EUR 6.00 to 9.99 (111 entries / 41.73%), followed by the sector of EUR 10.00 to 14.99 (100 entries / 37.59%). The price sectors of EUR 15.00 to 19.99 (25 entries / 9.40%), of EUR 2.99 to 5.99 (16 entries / 6.02%) and of EUR more than 20.00 (14 entries / 5.26%) follow at a large distance.

When analysing the price range in which most of the wines consumed by the respondents are located, the clear winners are the ranges of EUR 6-9.99 and EUR 10-14.99. This means that the Austrian winegrowers need to know which of their wines are and could be sold via which channels and at what prices and which of their wines belong to the price categories preferred by the test persons. Therefore, an analysis of the production costs is indispensable.

Relation of selected shopping locations for wine and the price range of bought wines
It was investigated whether there was a relation between the individual shopping locations and the price range of the wines purchased (depicted in table 10).

Shopping location	Price range
Supermarket	
Discounter	
Specialised wine trade	X
Winery	X
Wine shop	X
Online	X

Legend: X indicates that a relation exists

Table 10: Relation between shopping locations and price range.
Source: Own survey

While no relation between the price range and the shopping locations supermarket and discount store could be found, a statistically significant relation was found between the shopping locations specialised wine trade (table 49), winery (table 50), wine shop (table 51) and online (table 52) and the price range.

Relation between the price range and the information-seeking behaviour about wines and wineries
Furthermore, it was investigated whether there is a relation between the price range of the purchased wines and the information-seeking behaviour of the test persons about wines and wineries.
In both cases, a statistically significant relation was found (tables 53 and 54).

Question 11: Which factors are decisive for you to taste wines?

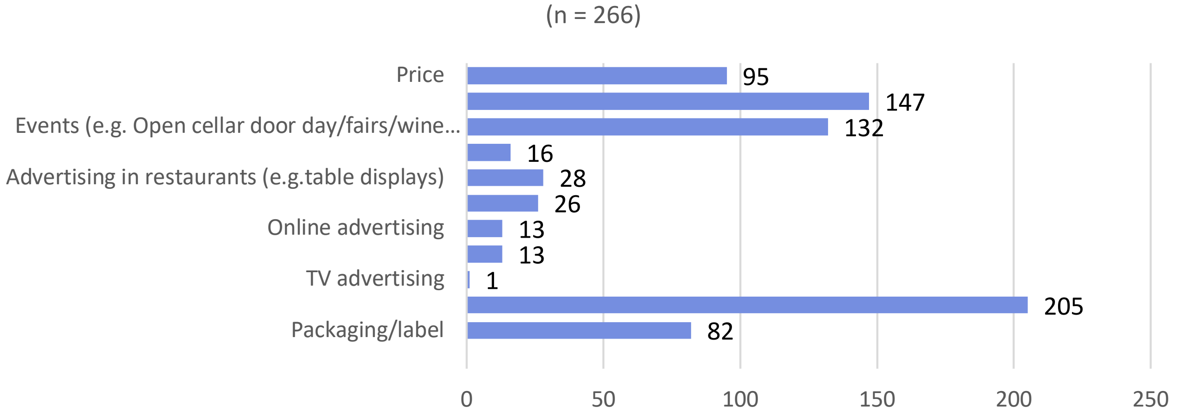

Figure 32: Decisive factors for tasting wines.
Source: Own survey

Figure 32 provides information about the factors that are decisive for tasting wines. The recommendation from friends, colleagues or the service staff in restaurants is the most important factor to 205 test persons. 147 people indicate that special occasions, such as a birthday, are important in deciding whether to taste wines. 32 people state that events are the deciding factor. 95 respondents state that the price is a decisive factor and 82 name the packaging or label of the bottle. 28 people indicate that advertisements in restaurants make them taste, and 26 are influenced by advertisements in magazines. Advertising in shops is relevant for tasting wines for 16 people and 13 people each state that leaflet advertising and online advertising incite them to taste. 1 person indicates that TV advertising is a decisive factor for tasting wines.

When it comes to factors that are crucial for respondents to taste wines, the survey clearly shows that recommendations from friends, colleagues or service personnel are by far the most important factor, followed by special occasions and events. Price and packaging also play a major role, while all forms of advertising have comparatively little impact on the decision to taste wines, according to the respondents. For Austrian winegrowers this means that they should be aware of the power of recommendation marketing and word of mouth. Every customer is a potential ambassador of the wines. Therefore, every single point of contact with customers or interested parties should be coordinated and thought through with regard to the company's philosophy. This applies to all communication channels operated by the winery, from personal visits to the winery, to events and trade fairs, to contact on new media channels and possible advertising. The packaging, which includes the equipment of the wine bottle and the label, should be attractively designed and also reflect the philosophy of the winery. The price factor has already been discussed (see above).

Relations between the decisive factors for tasting wine and the outlets where it is bought
Table 11 shows the relation between selected shopping locations for wine and decisive factors for tasting wines.

Shopping Location	Decisive factors
Supermarket	X
Discounter	X
Specialised wine trade	
Winery	
Wine shop	
Online	

Legend: X indicates that a relation exists

Table 11: Relation between shopping locations and decisive factors for tasting wines.
Source: Own survey

While there is no relation between the decisive factors and the specialist wine trade[25], winery[26], wine shop[27] and online[28], a statistically significant relation could be found between buying wines at the supermarket (table 55) and at discounters (table 56) and the decisive factors for tasting wines.

C Product characteristics

Question 12: From which countries do you buy wine?

[25] Chi^2: 37.080, df: 40, p-value: 0.602
[26] Chi^2: 52.266, df: 40, p-value: 0.093
[27] Chi^2: 24.686, df: 40, p-value: 0.973
[28] Chi^2: 47.321, df: 40, p-value: 0.199

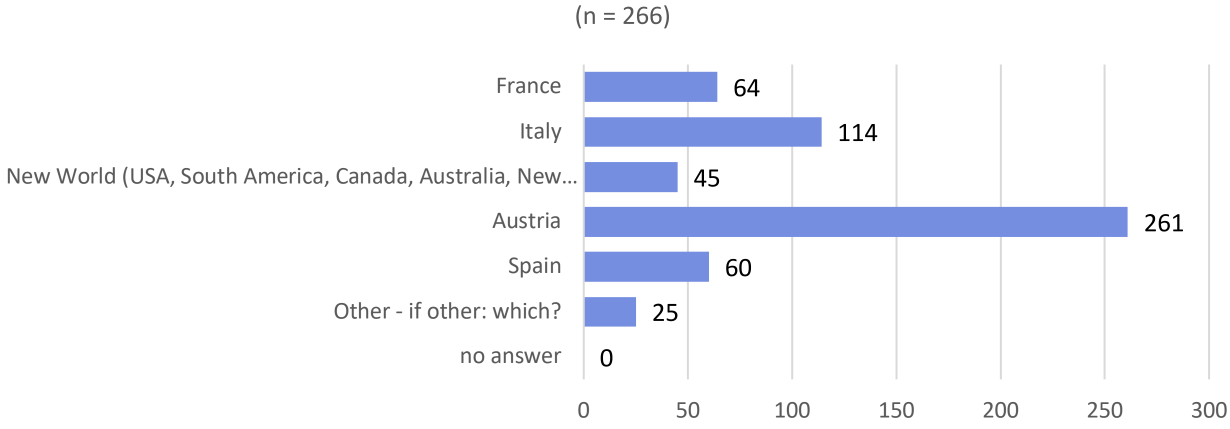

Figure 33: Countries of origin from which wines are purchased.
Source: Own survey

Figure 33 deals with the countries of origin of the wines purchased by the test persons. With 261 mentions, Austria is clearly in first place among the wine-growing countries whose products are bought in Austria, followed by Italy in second place with 114 mentions and France in third place with 64. Spain follows France with 60 mentions. Other countries of origin from which wines are bought by the test persons are Germany (11 mentions), Croatia (5 mentions), Slovenia and Hungary (4 mentions each), Portugal (3 mentions), Greece (2 mentions), Czech Republic, Serbia, Georgia and UK (1 mention each).

As far as buying wine is concerned, the test persons confirm exactly the image of the typical Austrian consumer: In Austria, the market share of domestic wines is 79.75% (figure 8), and the respondents also state that they buy most of their wines from Austria. For the Austrian winegrowers this means that the conditions for selling Austrian wines in the domestic market are very good and that it is important to take advantage of this.

Relation between selected shopping locations for wine and the country of origin of wine

Table 12 depicts the relation between selected shopping locations for wine and the country of origin of bought wines.

Shopping location	Country of origin of wine
Supermarket	
Discounter	
Specialised wine shop	X
Winery	
Wine shop	X
Online	X

Legend: X indicates that a relation exists

Table 12: Relation between shopping locations and country of origin of wine.
Source: Own survey

While no relation was found between the shopping locations supermarket, discount store and winery[29] and the country of origin of purchased wines, a relation that is statistically significant was uncovered with the country of origin and the shopping locations specialised wine trade (table 57), wine shop (table 58) and online (table 59).

Next, it was examined whether there is a relation between the information-seeking behaviour about wines and the countries of origin of the wines they buy. This is not the case[30]. However, a relation, which is statistically significant, was found between the countries of origin of the wines the respondents buy and the information-seeking behaviour about wineries (table 60).

Question 13: Which trends in the domestic wine scene do you know?

The following trends on the domestic wine market were identified by the test persons: Organic viticulture (38 mentions), orange wines (22), natural wines (19), biodynamic viticulture (12), sustainability and alternative types of finishing work (5 each), fungus-resistant grape varieties, organic-biological viticulture, sparkling wines, trend towards lighter and fresher wines (4 each), PetNats, alternative wines, Demeter, DAC wines and increasing quality (3 entries each), aged white wines (2 entries), spontaneous fermentation, wines of reduced alcohol level, regionality, mature wines, red wines drunk cool, minimalist winemaking, rosé, autochthonous grape varieties, site wines and new young winemakers (1 entry each).

Questions 13 and 14 are analysed together following question 14.

Question 14: Have you ever heard of the following trends?

[29] supermarket: Chi^2: 16.549, df: 20, p-value: 0.682 / discounter: Chi^2: 15.386, df: 20, p-value: 0.754 / winery: Chi^2: 22.179, df: 20, p-value: 0.331

[30] Chi^2: 28.268, df: 30, p-value: 0.556

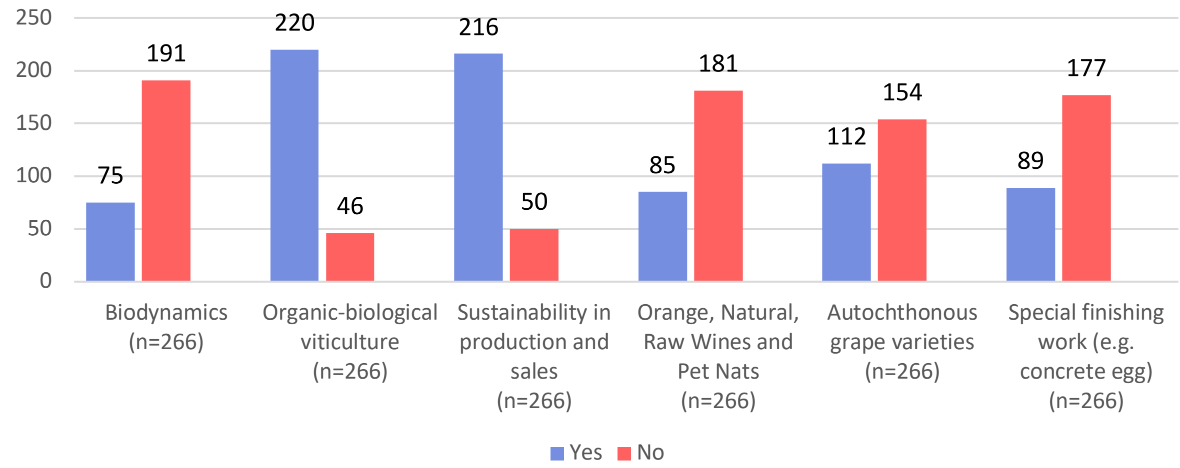

Figure 34: Trends in the Austrian wine industry.
Source: Own survey

Figure 34 shows information on the awareness of selected trends in the Austrian wine industry among the test persons. 75 persons (28.20%) state that they have already heard something about biodynamics, while 191 (71.80%) deny this. 220 persons (82.71%) are familiar with organic-biological viticulture, but 46 persons (17.29%) do not know about it. 216 respondents (81.20%) know the trend for "sustainability in production and sales" and 50 (18.80%) are not familiar with it. 85 persons (31.95%) are familiar with orange, natural, raw wines and Pet Nats, whereas 181 (68.05%) are not. As far as autochthonous grape varieties are concerned, 112 (42.11%) people say they have heard of them and 154 (57.89%) deny this. Special types of vinification are known as a trend by 89 (33.46%), but 177 persons (66.54%) deny this.

The trends identified by the respondents largely coincide with the trends specified by the survey. Sustainability and organic-biological winegrowing are dominant buzzwords in the wine industry. In addition, everyone is currently talking about orange, natural, raw wines and Pet Nats. For Austrian winegrowers this means that they have to weigh up whether they want to join one trend or another. This is a decision of the company's philosophy. On the one hand it offers the chance to reach new customer groups and on the other hand it carries the risk of getting bogged down.

Relation between the awareness of trends and attending wine fairs and wine-related events

Table 13 shows the relation between the awareness of trends and the attendance at wine-related events and fairs.

Trend	Attendance at wine-related events	Attendance at wine fairs
Biodynamics	X	X
Organic-biological viticulture	X	X
Sustainability in production and sales		
Orange, natural, raw wines and Pet Nats	X	X
Autochthonous grape varieties	X	X
Special types of vinification	X	X

Legend: X indicates that a relation exists

Table 13: Relation between shopping location and the attendance at wine-related events and wine fairs.
Source: Own survey

Between knowing trends and attending wine fairs and wine-related events by the test persons, significant relations – with the exception of the trend "sustainability in production and sales"[31] – could be found (p-value: 0.000).

D Names and brands

Question 15: Do you know the following Austrian winegrowers and wineries?

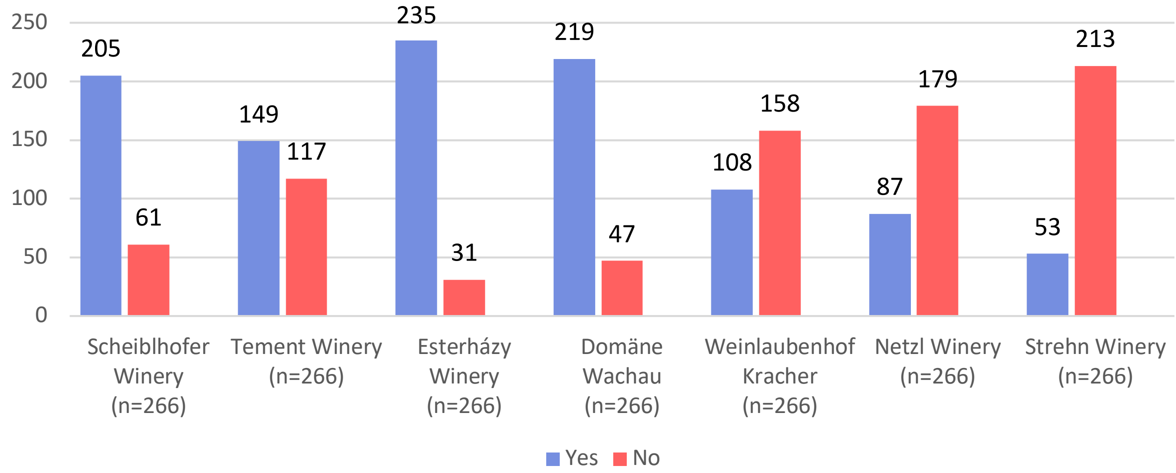

Figure 35: Awareness of selected Austrian winegrowers and wineries.
Source: Own survey

[31] fairs: Chi^2: 1,044, df: 2, p-value: 0.593 / events: Chi^2: 3.329, df: 3, p-value: 0.344

Figure 35 shows the awareness of some selected Austrian vintners and wineries among the test persons. Scheiblhofer is a household name for 205 test persons (77.07%), but 61 (22.93%) do not know it. 149 persons (56.02%) do know the Tement winery and 117 (43.98%) do not. The Esterházy winery is known by 235 test persons (88.35%), but not by 31 (11.65%). The Domäne Wachau is known to 219 test persons (81.20%) and 47 (17.67%) are not familiar with the name. Weinlaubenhof Kracher is known by 108 respondents (40.60%) of the survey and 158 (59.40%) state not to know this domain. The Netzl winery was recognised by 87 people (32.71%) and not by 179 (67.29%). 53 people (19.92%) know the Strehn winery and 213 (80.08%) state that they do not know this winery.

Relation between the awareness of selected wineries and the information-seeking behaviour about wines and wineries

Subsequently, it was investigated whether there is a relation between the information-seeking behaviour about wines and wineries, and the awareness of selected winemakers by the test persons.

It was found out that there is a statistically significant relation between all of the selected wineries and the information-seeking behaviour about wineries and also about wines (p-value: 0.000).

Questions 15 and 16 are analysed together following question 16.

Question 16: Do you know other Austrian winemakers/wineries? Which ones?

The test persons named a total of 543 different wineries. The most frequent mentions are Hillinger (40), Aumann (26), Heinrich (16), Skoff (15), Bründlmayer, Nittnaus, F.X. Pichler, Polz (14 entries each), Knoll and Sabathi (13 entries each), Kerschbaum, Markowitsch (12 entries each), Jurtschitsch, Hagn and Sommer (10 entries each).

The wineries mentioned in the survey, whose level of awareness is explicitly asked for, differ in the areas of business location (various wine-growing regions), business size (from 28 to 450 ha) and form of management (owner-managed or non-owner-managed). They represent – in different forms and depending on their size – current best practice examples within their sector. The analysis of selected winegrowers shows that the wineries with a larger number of hectares are better known than those with a smaller farm size. The number of hectares determines the possible quantity of bottles to be sold and thus the need for awareness and advertising. For Austrian winegrowers, this means that the degree to which promotional measures should be used, is related to the quantity of bottles to be sold. This will be discussed in more detail in the next chapter. All Austrian winegrowers and wineries additionally named by the test persons are characterized by excellent wine quality, large company sizes and/or professional use of marketing tools.

E Demographic data

Question 17: You are…

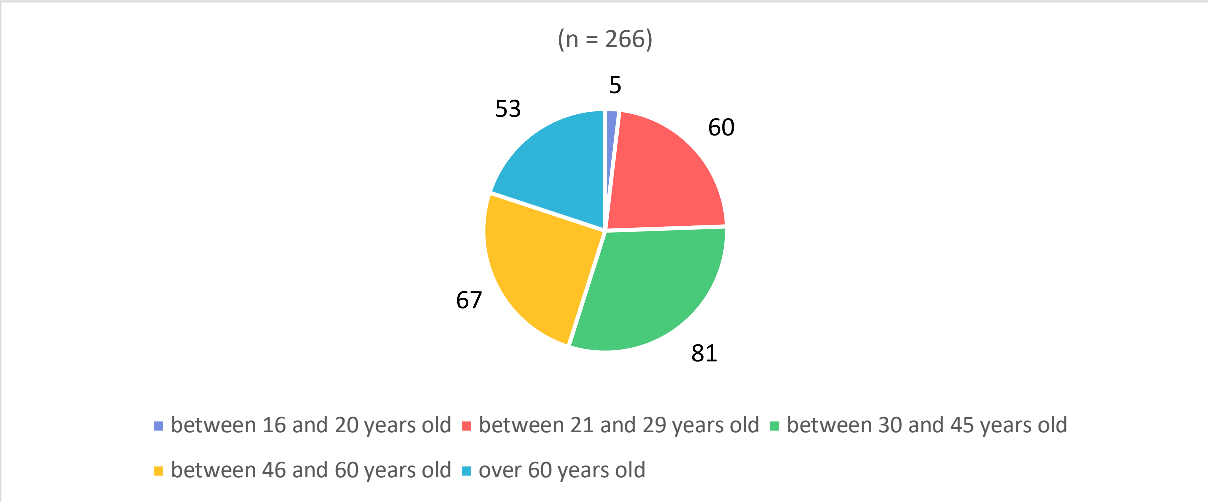

Figure 36: Age groups of the test persons.
Source: Own survey

Figure 36 describes the age groups of the participants of the survey as follows: 81 participants are between 30 and 45 years old, which corresponds to 30.45%. 65 persons are between 46 and 60 (24.44%) and 60 persons (22.56%) are between 21 and 29 years old. 53 participants are over 60 years old, corresponding to 19.92%. 5 participants are between 16 and 20 years old (1.88%). The test persons having taken part in the survey represent all age groups.

Relations between the age of the respondents and the information-seeking behaviour about wines and wineries

No relation could be found between the age of the test persons and the information-seeking behaviour for wines and wineries.[32]

[32] Information about wines: Chi^2: 30.527, df: 24, p-value: 0.168 / information about wineries: Chi^2: 18.128, df: 16, p-value: 0.316

Relations between the age of the respondents and selected shopping locations for wine

No statistically significant relation was found between the shopping locations supermarket, discounter, specialised wine trade, wine shop and online and the age of the test persons[33], but a statistically significant relation was found between the shopping channel winery and the age of the test persons (table 61).

Question 18: Your highest completed education:

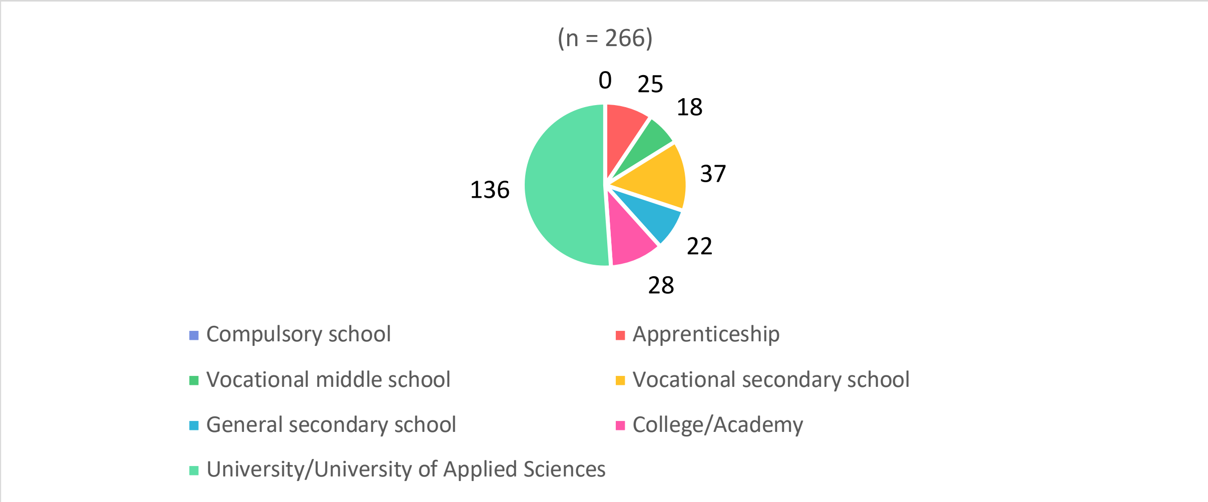

Figure 37: Highest completed education of the test persons.
Source: Own survey

Figure 37 shows that 136 respondents have a university or university of applied sciences degree, and 28 a college or academy degree. Twenty-two persons have completed a general secondary school leaving certificate and 37 a vocational secondary school leaving certificate. 18 persons have completed vocational middle schools and 25 have completed an apprenticeship.

Relation between the highest completed education of the test persons and the information-seeking behaviour about wines and wineries

No relation could be found between the highest completed education of the test persons and the information-seeking behaviour for wines and wineries.[34]

[33] Supermarket: Chi^2: 19.355, df: 16, p-value: 0.251 / discounter: Chi^2: 13.203, df: 16, p-value: 0.658 / specialised wine trade: Chi^2: 14.393, df: 16, p-value: 0.569 / wine shop: Chi^2: 19.98, df: 16, p-value: 0.221 / online: Chi^2: 15.969, df: 16, p-value: 0.455

[34] Information about wines: Chi^2: 25.721, df: 36, p-value: 0.898 / information about wineries: Chi^2: 20.85, df: 24, p-value: 0.648

Relation between the highest completed education of the test persons and the shopping locations.

No statistically significant relation could be found between any of the selected shopping locations and the highest completed education of the test persons.[35]

The fact, that this study does not optimally represent the Austrian population in terms of education is discussed in chapter 5.4.

Question 19: Your gross monthly income is...

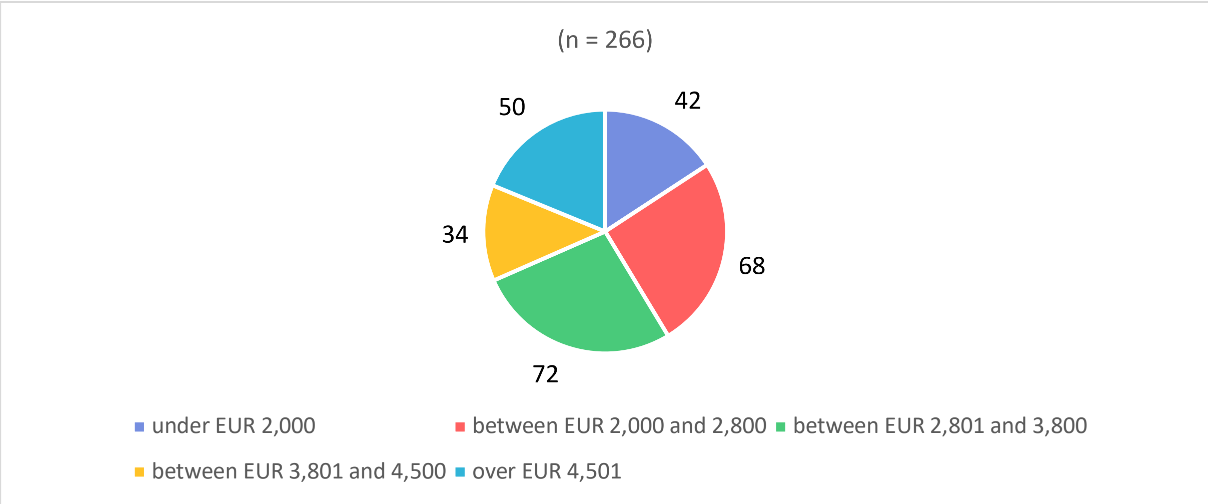

Figure 38: Gross monthly income of the test persons.
Source: Own survey

Figure 38 describes the distribution of income among the test persons. 42 participants of the survey state that they earn less than EUR 2,000 gross, and 68 earn between EUR 2,000 and 2,800. 72 state a gross monthly income between EUR 2,801 and 3,800 and 34 between EUR 3,801 and 4,500. 50 participants earn more than EUR 4,500 gross per month.

The average gross monthly income in Austria was EUR 3,652.14 in 2018 (Statistik Austria, 2019c). With 27% of all respondents stating to earn between EUR 2,801 and EUR 3,801, this income sector is also the most mentioned in the survey.

[35] supermarket: Chi^2: 18.383, df: 24, p-value: 0.784 / discounter: Chi^2: 15.461, df: 24, p-value: 0.907 / specialised wine trade: Chi^2: 16.48, df: 24, p-value: 0.87 / winery: Chi^2: 27.491, df: 24, p-value: 0.282 / wine shop: Chi^2: 23.6, df: 24, p-value: 0.485 / online: Chi^2: 20.743, df: 24, p-value: 0.654

Relation between the gross monthly income of the test persons and the information-seeking behaviour about wines and wineries
As with the highest completed education and the age of the test persons, no relation could be found between the monthly income of the respondents and the information-seeking behaviour for wines and wineries[36].

Relation between the gross monthly income of the test persons and selected shopping locations
No statistically significant relation was found between any of the selected shopping locations and the monthly gross income of the test persons.[37]

The relations and correlations described above show that the use of marketing (communication) tools, shopping locations and the awareness of wineries are not independent of each other. Thus, it is important for winegrowers and people in charge of wineries to realise these relations, to react accordingly and to make use of this knowledge.

6.2.2 Validation of hypotheses

The answers to the hypotheses are based on the relations and correlations presented in the last chapter and will be briefly summarised for the purposes of clarity.
Relations are marked with "X" in the tables and correlations with "C".

Hypothesis 1: There is a relation between the shopping locations for wine and the information-seeking behaviour about wines and wineries.

Shopping location	Information about wines	Information about wineries
Supermarket		
Discounter		
Specialised wine trade	X	X
Winery	X	X
Wine shop	X	X
Online		X

[36] Information about wines: Chi^2: 21.459, df: 24, p-value: 0.611 / information about wineries: Chi^2: 12.493, df: 16, p-value: 0.709
[37] Supermarket: Chi^2: 16.934, df: 16, p-value: 0.39 / discounter: Chi^2: 13.616, df: 16, p-value: 0.627 / specialised wine trade: Chi^2: 22.451, df: 16, p-value: 0.129 / winery: Chi^2: 19.536, df: 16, p-value: 0.242 / wine shop: Chi^2: 19.955, df: 16, p-value: 0.222 / online: Chi^2: 21.525, df: 16, p-value: 0.159

Legend: X indicates that a relation exists

Table 14: Hypothesis 1: Relation between shopping locations and information-seeking behaviour about wines and wineries. Source: Own survey

As can be seen in table 14, there is a relation between purchases in the shopping locations specialised wine trade, winery and wine shop and the respondents' information-seeking behaviour for wines and wineries. In the case of online shopping, a relation was found between the shopping location and the information-seeking behaviour for wineries, but not for wines.

Accordingly, hypothesis 1 can only be partially confirmed, namely for the case of the shopping locations specialised wine trade, winery and wine shop with regard to the information-seeking behaviour about wines and for the case of the shopping locations specialised wine trade, winery, wine shop and online with regard to the information-seeking behaviour about wineries.

Hypothesis 2: There is a relation between the shopping locations for wine and the attendance at wine-related events and fairs.

Shopping location	Attendance at wine events	Attendance at wine fairs
Supermarket		
Discounter		
Specialised wine trade	X, C	X, C
Winery	X, C	C
Wine shop	X, C	X, C
Online	X, C	X, C

Legend: X indicates that a relation exists; C indicates that there is a correlation

Table 15: Hypothesis 2: Relation between shopping locations and attendance at wine-related events and wine fairs. Source: Own survey

Hypothesis 2 cannot be generally confirmed: As can be seen in table 15, the hypothesis can only be verified for the shopping locations specialised wine trade, winery, wine shop and online and the attendance at wine-related events as well as for the shopping locations specialised wine trade, wine shop and online and the attendance at wine fairs. In the case of the shopping location winery, the hypothesis can be answered to the effect that although no relation could be established between this very shopping location and the participation in wine fairs by the test persons, a negative correlation, which is statistically significant, could be established between these variables.

Hypothesis 3: There is a relation between the awareness of selected wineries and the attendance at wine-related events and wine fairs.

Winery	Attendance at wine-events	Attendance at wine fairs
Scheiblhofer	X	X
Tement	X	X
Esterházy	X	
Domäne Wachau	X	X
Kracher	X	X
Netzl	X	X
Strehn	X	X

Legend: X indicates that a relation exists

Table 16: Hypothesis 3: Relation between the awareness of selected wineries and the attendance at wine-related events and wine fairs.
Source: Own survey

As can be seen in table 16, with the exception of the Esterházy winery, for which there is no relation with trade fair attendance by the test subjects, hypothesis 3 can be confirmed: Yes, there is a relation between selected wineries and the participation in wine events and wine fairs by the test persons.

Hypothesis 4: There is a relation between the awareness of selected wineries and the information-seeking behaviour about wines and wineries.

Winery	Information-seeking behaviour about wines	Information-seeking behaviour about wineries
Scheiblhofer	X	X
Tement	X	X
Esterházy	X	X
Domäne Wachau	X	X
Kracher	X	X
Netzl	X	X
Strehn	X	X

Legend: X indicates that a relation exists

Table 17: Hypothesis 4: Relation between the awareness of selected wineries and the information-seeking behaviour about wines and wineries.
Source: Own survey

Hypothesis 4 can be confirmed in its entirety: Yes, there is a relation between the awareness of selected wineries and the respondents' information-seeking behaviour about wines and also about wineries, as also can be seen in table 17.

Hypothesis 5: There is a relation between the awareness of trends and the attendance at wine-related events and fairs.

Trend	Attendance at wine-related events	Attendance at wine fairs
Biodynamics	X	X
Organic-biological viticulture	X	X
Sustainability in production & sales		
Orange, natural, raw wines & Pet Nats	X	X
Autochthonous grape varieties	X	X
Special finishing work	X	X

Legend: x indicates that a relation exists

Table 18: Hypothesis 5: Relation between the awareness of trends and the attendance at wine-related events and wine fairs. Source: Own survey

As can be seen in table 18, with the exception of the sustainability trend, for which no relation to the attendance of wine events and wine fairs could be found, hypothesis 5 can be verified.

Hypothesis 6: There is a relation between the demographic data age, income and highest completed education of wine consumers and the information-seeking behaviour about wines and wineries.

Hypothesis 6 must be completely rejected. There is no relation between the age, income and highest completed education of the test persons and their information-seeking behaviour about wines and wineries.

6.3 Superposition of the results of the qualitative and quantitative research studies

By superimposing the results of the qualitative and quantitative research studies, the following conclusions can be drawn:

Information on purchasing behaviour of customers and its consequences for wineries

Winemakers should be aware that high-involved customers prefer wineries, wine retailers and wine shops as shopping venues and these are also customers who inform themselves about wines they consume and visit events regularly. Besides, this group of customers is aware of current trends in the wine industry. Therefore, information intended for this customer group should be coordinated and made available in all of these channels.

People who buy in supermarkets consider the price of the wine important, while for people who buy in the specialised wine trade, at a winery or wine shop, advice is an important parameter. The grape variety plays a role for buyers at the winery and also online. All people involved in the sale of wines should be aware of these facts.

Customers who visit trade fairs shop in the specialised wine trade, at wine shops and online. This information should also be used by wine producers.

The installation of a web shop is highly recommended if its continuous support is possible in terms of resources, as this is currently the most used online shopping option among wine customers.

Information search behaviour of customers and its meaning for wineries

Wine customers inform themselves about wines – in descending order – through advice, on websites and at events and about wineries – in descending order – online, at events and via magazines.

For the winery, this means that all persons entrusted with the sale of a winery's products must convey the philosophy of the business - whether they are employees of the winery itself, in the wine trade, in a wine shop or in reselling and catering. For the customer, each of these salespeople transmits the image of the winery. It is therefore advisable not only to brief one's own employees in the best possible way, but also to inform all persons who are involved in the sale of the wines about the key facts of the winery and the wines – preferably through unique stories. Promotional activities that allow contact with middlemen can also be used to pass on information that is of interest to all groups of customers.

Price ranges play a role for people who inform themselves about wines and wineries. Wine sellers should also be aware of this connection.

The winery's website, as an important channel for finding information about wines and also about winemakers, must be optimised for mobile use, kept up-to-date and be well structured. The application of a newsletter is also recommended, as it allows to inform customers in a cost-effective manner.

Participation in events must be optimally prepared and followed up, but is highly recommended, as events are also among the most important information channels. Whether a winery itself organises events must be carefully considered. If the decision is made to do so, it is important to use this tool wisely, as it shows great impact on customer loyalty. For the customer, an event is always something special that he or she associates with emotions. These created emotions should be used in sales by the wineries. As mentioned above, customers, who attend wine related events, tend to shop at wineries, wine retailers and wine shops.

Magazines are mentioned as the third most important source of information when it comes to wineries. Therefore, it is advisable for wineries to supply the media with relevant information in order to be mentioned editorially. This is a cost-effective alternative to advertisements and is beneficial for the winery's reputation. Advertisements are not recommended on the basis of price, unless the media budget of a winery is correspondingly high. Should the decision be made to place print advertisements, a frequency of at least four insertions per medium is recommended.

Important parameters for purchasing wines and their importance for wineries

The parameters perceived as important for the purchase of wine – price, grape variety, region, winery and advice – must be incorporated into the winegrower's sales strategy. The winemaker must be aware that the customer takes all these parameters into account when buying and makes his decision depending on his personal preferences. Therefore, each of these parameters should be tailored to the winery and communicated in an appropriate way.

Trends can be followed if they fit the philosophy of the company and if there is a desire to change or expand the product range. If this is the case, the trends “organic wine growing” and “orange wines” are currently identified as the most well-known.

Chances for enterprises in the Austrian wine sector

On a more general level, it can be said that great opportunities for SMEs in the Austrian wine industry have been identified. Austrian wines enjoy great popularity, and the drinking habits of the local people have not changed for the worse; on the contrary, they have even increased in some cases.

Austrian winegrowers have the opportunity to sell their wines via all channels, as their customers also shop in all channels. Austrian wine drinkers cover all age groups, all income levels and all educational levels and inform themselves via online and offline channels. It is therefore necessary to spread information and offers accordingly and to make them easily accessible to the desired groups of buyers, via above-the-line possibilities, below-the-line measures and of course their combination – through-the-line measures. It is important to disseminate information consistently and to use all available channels. Since all criteria, such as grape variety, wine-growing region, winegrower and price are equally important to the end customer, but the information channel "recommendation" stands out, wineries should be aware of this and use this very fact to their advantage.

7 A marketing communication model for small and medium-sized enterprises in the Austrian wine industry

On the basis of all answers given by the experts and the evaluation of the results of the survey as well as the combined information, conclusions can be drawn and recommendations for action for small and medium-sized enterprises in the Austrian wine industry can be derived.

Based on years of professional experience in this particular field and on the results of the expert interviews, it has been established that basic prerequisites for enterprises to make successful changes in the field of marketing communication are high-quality wines and an attractive packaging that fits the philosophy of the winery.

In the appendix, a 3-step programme is presented, which is based on the elaborations in this thesis. Interested wineries are recommended to follow and explore all three steps in detail as this model is intended to accompany wineries step by step through the process:
From analysis of the status quo (Step 1: Evaluation) to goal setting (Step 2: Definition and formulation of objectives) and implementation (Step 3: Implementation) of new marketing communication tools.

In order to offer the greatest possible support to companies, the presentation of the marketing communication model also includes recommendations for company analysis, which were assumed in the course of the work and therefore not described in detail earlier.

The 3 steps of the model are as follows:

Step1: Evaluation of the status quo

↓

Step 2: Definition and formulation of objectives

↓

Step 3: Implementation of the defined measures in order to achieve the set objectives

Figure 39: Process of the implementation of marketing communication tools.
Source: Own presentation.

For maximum output and best results, it is recommended to follow each step of the model (as presented in figure 39).

The entire marketing communication model including a comprehensive work sheet is presented in the appendix, as it can be seen as a work in its own on the one hand and would go beyond the scope of the present work on the other. Companies have the possibility to fill in their data and information directly in order to have a ready concept for their changes at hands after going through the steps. For better orientation, benchmarks from the Austrian wine industry are given when appropriate.

The result of the research work – the created marketing communication model – represents a significant contribution to the development of a scientific novelty. Through the unique combination of scientific research and practical tips, this marketing communication model represents a tool that can be implemented by wineries without external help. This gives them the opportunity to bring about desired positive changes in the area of marketing communication and, based on this, opportunities for more economic success, which in turn have the potential to strengthen this entire economic sector in Austria.

8 Future prospects and conclusion

The last lines are dedicated to both, future prospects and further research work based on this very thesis and the final conclusion of the existing work, especially of the created communication model.

8.1 Future prospects

The following section outlines possible future studies that are related to the present research work.

Further research based on literature research
Based on findings that have emerged during the research activities of this thesis, it would be interesting to deal with the collection of data on the distribution of sales of Austrian wine into the individual distribution channels. This information would be important in order to show Austrian wineries which channels offer which opportunities for the sale of domestic wines.

Furthermore, it would be advisable to collect precise data on farm-gate sales, as this channel is important for customer loyalty and the products sold on the farm achieve good prices.

Moreover, it should be investigated whether the place of residence of the test persons has an influence on their behaviour with regard to wine purchase and information search behaviour about wine and wineries.

In addition, the collection of wine-related data on the specialised trade, discounters and online shopping would be of great importance for companies in the Austrian wine industry. Especially the shopping locations "discounter" and "online" are experiencing – according to general statistical data – great growth at the moment and therefore, it would be interesting to know whether this fact also applies to the Austrian wine industry and what opportunities for Austrian wine-growing enterprises could result from this.

Eventually, in this area it would also be important to investigate the effects of subsidies on export activities of Austrian winegrowers.

Further research based on the study "Implementation of marketing communication tools in the Austrian wine industry"
As a future study, that builds directly on this research, the developed communication model should be applied by a representative number of small and medium-sized enterprises in the Austrian wine sector. After at least three years of correct application of the combination of the presented tools, first conclusions can be drawn about the change in the economic situation of the participating wineries and a verification whether there was an increase in success can be confirmed.

Additionally, the application of the developed model in the wine sector of further countries, especially in the discussed countries Germany, Italy, USA, Australia and New Zealand, would be highly interesting as then again comparisons to the Austrian wine sector could be drawn and further recommendations for winegrowers in the respective countries could be derived.

8.2 Conclusion of the research study

To conclude this study, first the research question is answered and subsequently a final conclusion is presented.

Answering the research question
The research question "Can a marketing communication model be created for wineries whose implementation leads to measurable success of small and medium-sized enterprises in the Austrian wine industry" can be answered in the affirmative to the extent that, with the help of qualitative and quantitative research methods, a marketing communication model could be drawn up whose implementation predicts greater success for wineries in Austria. This model – just like the marketing communication tools used – must be constantly evaluated and updated if necessary, as the presented tools are subject to continuous and rapid change, which must be taken into account in order to achieve optimal outputs.

Conclusion of the research study
It is particularly important to understand that the individual sub-aspects of the results of the research work and of the elaborated model cannot be seen independently of each other. This means that great awareness and good ratings have the potential to result in good editorial contributions, which are perceived by interested customers in the end and reseller area, which

in turn have the potential, through positive word of mouth, to expand the customer base and, if necessary, can mean better prices for the producer, which in turn leads to more opportunities in the area of awareness and so on.

It is equally important that the wineries understand where there are points of contact with both existing and potential customers and where these can be created. In order to make the most of this customer journey – the interactions that take place between customers and the winery through all available channels at all times – before, during and after the purchase – it is important to perceive processes through the eyes of the customers, gain the trust of them and demand honest feedback on all parameters such as products, materials and presentations in order to draw valuable conclusions.

Therefore, it is important to enter this cycle and to adjust all screws continuously until the desired effect is achieved. The best way to get started is to set parameters that the company itself can control: the correct use of the website and – if desired and possible in terms of time and personnel resources – social media, appealing communication with customers, targeted acquisition of new customers in desired segments, judicious selection of awards, events and trade fairs and informing local media and trade journalists after having become aware of and having communicated their own story.

The creation of a marketing communication model for small and medium-sized enterprises in the Austrian wine industry represents a scientific novelty in this sector. Elaborated scientific research, both qualitative and quantitative, own professional experience and the extraction of the key findings as well as the subsequent combination of all relevant aspects lead to a new approach in terms of consulting for wineries in the area of marketing communication. The result of this research work – an integrated communication model – shows new possibilities and strategies for achieving measurable success in a way that is easy to implement. For Austrian wineries, this means that by following the steps presented, measurable improvements can be expected in all the business areas discussed shortly after implementation. In addition, economically successful domestic wineries have the potential to strengthen this very economic sector in Austria.

Closing words

On the one hand, the presented marketing communication model provides winegrowers and people in charge of wineries with exactly the knowledge they need to bring successful changes to life in one or more business areas and, on the other hand, it gives them the tools they can implement on their own – without additional costs or urgently needed external support and is therefore perfectly tailored for small and medium-sized enterprises in the Austrian wine industry – and this is exactly what makes it so unique.

"Paths are made by walking them".

(Franz Kafka)

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APPENDICES

Appendix A

Questionnaire for expert interviews

Part A Factors of success

1. In your opinion, how can success of Austrian winegrowers/wineries be measured?
2. In your opinion, what should winegrowers and wineries do to achieve maximum success?

Part B Marketing communication tools already in use in the Austrian wine sector

3. In your opinion, which marketing (communication) tools are already successfully used by Austrian winegrowers and wineries?
4. How important would you consider the correct use of the following marketing communication tools in the Austrian wine industry – provided the goal of the winery would be defined economic success:
    a. functioning and up-to-date website
    b. social media presence
    c. participation in fairs and events
    d. being an organiser of events yourself (e.g. harvest festivals in your own house)
    e. presence in the media through advertisements and/or editorial contribution
    f. participation in awards
5. In your opinion, are there any other parameters (“black box”) that can clearly contribute to success? If so, which ones?

Part C The position of marketing within enterprises in the Austrian wine industry

6. How do you assess the position of “marketing” of non-owner-managed wineries?
7. In your opinion, are cooperatives and wineries that are not owner-managed disadvantaged in terms of marketing? And if so, why?

Part D Current trends in the Austrian wine industry

8. What are the current trends in the Austrian wine industry, and should winegrowers take them up?

Part E Successful wineries and strong brands in the Austrian wine sector

9. Which five Austrian winemakers are most successful in your opinion and why?
10. Which Austrian winery has, in your opinion, the strongest brand and why?

Detailed results of the expert interviews (qualitative research study)

Question number 1: In your opinion, how can success of Austrian winegrowers / wineries be measured?

The interviewees show a uniform picture, even if the degree of implementation varies. Expert number 1 lists the accounting key figures of sales, turnover and revenue as measurable criteria for success, while expert number 4 adds a time component to these figures, namely the analysis of the accounting key figures in a context of several years, since wine is a natural product and both quality and quantity fluctuations occur in the annual cycle. The other three experts also agree with this view. A further mentioned factor is economic success taking into account all investments and objectives. Expert number 3 states that the profit achieved is the best indicator – wines sold at a good price. The experts identify awareness on the market in the defined target groups, image and awareness in the industry, price stability, a baseline of ratings, presence and status with resellers and the stability of sales partners on the market in general as further units of measurement of success. The number of new customers per year and the customer structure are cited as further criteria for success. It is important that the customer structure is designed in such a way that the company is fit for the future. Both the age structure of the customers and the distribution – is the company dependent on one large customer or does it have several mainstays? – play a major role in minimising risks. Finally, the frequency and quality of media coverage and awards as well as brand strength were mentioned.

In a nutshell, the most important measuring instruments for success in the Austrian wine industry are accounting key figures, demographic development and risk minimisation in the customer segments and the degree of overall awareness.

Question number 2: In your opinion, what should winegrowers and wineries do to achieve maximum success?

Question number 2 of part A deals with general recommendations on what winemakers or people in charge of wineries should do to generate maximum success.

In this case, the answers of the experts differ significantly at first glance. Expert number 1 considers wine quality, pricing, good marketing and social media as well as having a website and a web shop to be guarantees of success. Information must be provided and made easily accessible. Expert number 2, for whom quality is also a basic requirement, states that goals must be set, and perspectives must be developed for up to three to five years. Furthermore, he points out that on the one hand, one's own brand and what it stands for and on the other hand, the markets and customers must be understood, not only one's own products. He explicitly mentions sales support as a tool. In short: it is about long-term planning and a good understanding of the status quo. Additionally, he says, it's a matter of thinking about goals and weighing up whether existing relations will last and are sufficient and taking tendencies seriously. Expert number 3 believes in a strong presence in the right places as a key factor. The name of the winery, the brand, must be read, heard and seen over and over again. The expert makes a further remark: doing public relations only makes sense once a network has been established. And in order to get there, the winery needs stories and sales partners to open first doors, as well as wine reviews to support this work. Expert number 4 sees internal evaluation, clear objectives and a vision as the key to success. It is also important to assess where the winery and its quality really fit in. Only in this way, important decisions can be made strategically. As an evaluation tool, he recommends a classic SWOT analysis and adds that this evaluation can be applied and recommended for both micro-enterprises and very large enterprises. Expert number 5 also pleads for fundamental strategic considerations with the help of a SWOT analysis, carried out in the classic way using the 4ps, supplemented by the 5th p: people. Especially in the wine industry, products are strongly linked to the personality of the producer and this can be a strong factor for a high brand affinity and attractiveness among the target groups.

Question number 2 can be summarised as follows: According to the experts, success is linked to the understanding of the importance of the brand as well as to awareness in the market and to a good analysis and planning.

Question number 3: In your opinion, which marketing (communication) tools are already successfully used by Austrian winegrowers and wineries?

Question number 3 included a query as to which marketing (communication) tools are already successfully used by Austrian wineries.

Expert number 1 thinks that a combination of tools used, namely good ratings, events when they are picked up by the media and support of retailers is best. Expert number 2 is satisfied with the use of marketing (communication) tools in Austria in the areas of printed material, packaging and external performances, both at trade fairs and events. He also gives good marks to the social media presence of wineries that use this form of media correctly. Furthermore, he mentions the tool "farm gate sales" as being a very good one, as many touchpoints with the customers are created. Expert number 4 thinks that Austrian winegrowers are doing good in the areas of trade fair presence, tastings, especially at the point of sale and at wine ratings but also in the area of media, both in advertising and in social media and newsletters. Expert number 4

is satisfied with public presentations and B2C-trade fairs. Likewise, many companies are well and professionally positioned in terms of public relations, namely those who need this form of communication. Expert number 5 is of the opinion that Austrian wineries act professionally in the area of event marketing (trade fair and tasting presentations), sending wine samples, participation in awards, sponsoring, public relations and, in some cases, social media.
In short, this means that the tools “attendance at events and consumer fairs”, “wine awards”, “farm-gate sales” and, in some cases, “social media” are already being well used. Public relations are already being deployed professionally by some companies and sales promotion is also already being well used by Austrian companies.

Although it was not specifically requested, most of the experts also reveal what they believe is not yet optimally implemented or applied by Austrian companies. On the one hand, brand management, the so-called programming, is mentioned. There is a complete lack of understanding of which promotions should be offered in which periods of time and at which prices, as well as for the distribution channels.
The performance of Austrian wineries at B2B trade fairs could also be improved. The expert says that it has to be recognised that more pre- and post-processing time must be taken into account, and also the fact that fewer partners and partners who have less time and need a tailor-made offer are reached at these fairs.
A major shortcoming is noted in the online presence of the wineries. Both the topicality of data and information and the structure of many websites are criticised, and social media is not yet used optimally by many wineries. In some cases, there is a lack of understanding that the new media are communication channels that have to be constantly monitored.
In short, Austrian wineries have a lot of catching up to do in the entire online communication sector, in the field of B2B trade fairs and in brand management.

Question number 4: How important would you consider the correct use of the following marketing communication tools in the Austrian wine industry?

With question number 4, the experts answer to the importance of the correct use of websites, social media, participation in trade fairs and events, organising events, media coverage and awards. Subsequently, the experts were asked whether other parameters, which could contribute significantly to success not mentioned above, could be added.

All experts agree that the correct use of a *website* that is also optimised for mobile devices is extremely important and indispensable. The desired information must be well prepared and found immediately. A web shop can be integrated into the website but does not have to be.

The correct use of *social media activities* is seen in a more differentiated way by the experts. While expert number 1 states that conversions are difficult to achieve, he confirms that reaching a large group of customers is possible with a small budget and target groups can be strategically defined, built up and converted into numbers. He recommends setting cookies and using call-to-action buttons to monitor success. Professionalism is the most important parameter when applying social media activities, according to expert number 2. A prerequisite for success in the field of social media is the sales structure behind it. He says that brand building works better with newer wineries. In this case, too, the strategy is important - you have to choose exactly what suits your brand. According to expert number 3, the big advantage of social media is the speed of spreading news. You can inform everyone immediately about everything, and you can reach many people very quickly and for free. But it is important to know that these campaigns are not characterized by sustainability and that social media channels therefore should be well and intensively supported. Expert number 4 refers to the philosophy of the winery but thinks that the importance of this tool is increasing for companies that think in the long term. Expert number 5 considers social media to be medium important.
In summary, the correct and professional use of social media can be said to have the potential to reach a large target group in a short period of time, which can be built up strategically, provided that the company's sales structure is geared to this. It is also important for the use of this tool that it fits the philosophy of the winery and that the winery is aware of the peculiarities of the communication medium.

Participation in trade fairs and events is seen as ambivalent by expert number 1. According to the expert, it is a combination of several factors that can make the difference. In any case, a precise and objective examination of which trade fair or event one should participate in is important. B2B trade fairs receive a positive report. Provided that it is feasible from a budgetary point of view, one should participate in several trade fairs and events. However, winegrowers should be aware of the fact that stamina is needed when using this very marketing communication tool. Expert number 2 ranks the importance of the participation in trade fairs and events as very high, but also under the premise that the event is very well selected, especially with regard to customer groups and target markets. The importance of

comprehensive preparation and follow-up is also stressed. Expert number 3 also agrees with this tenor and adds personal presence as a multiplier for customer loyalty. The statements of expert number 4 are in complete agreement with expert number 3. Expert number 5 states a "very important" in the ranking.
In summary, this means that the participation in trade fairs and events is very important, but that it should be preceded by precise selection and excellent preparation and completed by extensive follow-up work.

Being an organiser of events yourself, is seen as a positive and increasingly important factor by all of the experts. This tool has a positive effect on customer loyalty, even if the effort and the demands of the guests are extremely high. Customers benefit from unique experience, but the presence of the winegrower is absolutely necessary.

The next tool to be explained is *media coverage*. Expert number 1 is clearly against the paid placement of advertising subjects, but weakens this assertion for advertorials, i.e. paid editorial contributions. He also raises the question of readership: special editions or themed magazines can be useful if the distribution of the magazine is targeted, for example in 5-star hotels in a certain region. In general, however, one could achieve more with EUR 500 on Facebook than with any print advertisement. Expert number 2 has a similar opinion. He sees advertisements depending on the objectives: if a winery wants to stay in the same place, he would recommend that the corresponding budget be used for customer service. If you want to acquire new customers, advertisements can be helpful, but only if there are four or more advertisements placed in cooperation with a sales partner. It is said that only a few companies in the Austrian wine industry can afford this expenditure in budgetary terms. Better ways to reach customers are, according to expert number 2, events and presentations. Expert number 3 also speaks out completely against paid advertisements but explains the importance of editorial contributions and recommends carrying out continuous work in the field of public relation and provide good material. Expert number 4 states that the importance of paid advertisements used to be much higher than it is now but acknowledges the importance for large wineries that are geared to this. Expert number 5 considers editorial reports very important, but also believes that purchased advertisements are significantly less important than they were years ago.
In summary, this means that paid advertisements have lost their importance in the Austrian wine industry – except for a few large companies – but that public relations and editorial contributions are justified and should be used.

When it comes to *awards, wine ratings and competitions*, all five experts regard them as important marketing communication tools. Expert number 1 points out that – although definitely important – awards depend on the target group. For low-involved customers they are a must, whereas for high-involved customers they make less sense, because the information-seeking behaviour is different, and more mature decisions are made. Expert number 2 states that a certain baseline of ratings is necessary, both for domestic and foreign traders and for customers who buy directly at the winery. For retailers, ratings are a reflection of a certain quality over the years and for far-from-home customers they are a reinsurance for the purchase. Ratings are an additional argument for the quality of a wine, but never the main argument. Expert number 3 considers ratings to be very important but points out that one must distinguish between blind and open tastings. In open competitions, there is no denying that a combination of the wine, its packaging and the reputation and awareness of the winery (has the taster already met the winemaker or read something about him?) is decisive. According to expert number 4, awards are an important tool for internal communication. They are an important confirmation for the customers that they are buying a good product, but not a suitable tool for acquiring new customers. He recommends being very selective when choosing the competitions and paying attention to the wine style and business philosophy. Expert number 5 also assigns great importance to awards.

In short, this means that wine ratings and awards are an important tool for the internal marketing communication of a winery, which can be used to support both resellers and existing end customers. However, the choice of which awards to participate in should be done very selectively.

Question number 5: In your opinion, are there any other parameters ("black box") that can clearly contribute to success? If so, which ones?

Question number 5 goes one step further and asks for additional factors and measures whose application can contribute significantly to the success of enterprises in the Austrian wine industry. Although this question did not contain any specifications, all experts without exception addressed people and personalities, albeit in different facets. For expert number 1, the personality of the winegrower per se counts as a criterion for success or failure. For many of those responsible, it is not clear what authenticity means in the age of social media and how to communicate properly. Also, the assistance of a style and communication consultant is often not an option but would be important and recommendable. The opinion of expert number 5 agrees with the previous opinion and adds that the personality of the winemaker has a significant influence on the perception and affinity of customers to the winery. It is important that the orientation of the brand is in line with the personality of the winemaker and results in a coherent story. Influencers who talk or write about the winery can also make a significant contribution to the winery's reputation and success, as can a unique (hi)story of the winery, if told correctly. According to expert number 3, people are also among the most important factors. In this case, however, key personalities outside the winery are mentioned in addition to the personality of the producer. By this, expert number 3 means opinion leaders and influencers in the industry, be they sommeliers or other people who talk about wine and spread the word. Regarding the personality of the winemaker, expert number 3 states that a good personality would not make any nonsense about the product. The best wine does not help if you cannot sell it, and the best salesman still needs a good product. Anything else would not be close at hand. Having an extroverted personality is never a disadvantage in this business, but it is especially important to think outside the box and think about the unreal in the future. Expert number 4 emphasises a positive attitude and positive awareness. Active recommendation of colleagues and respect for others will contribute to economic success in the medium term. If you can offer something special yourself, you should emphasize this explicitly without defaming other companies. It is also important to have a presence in one's own region and, as a final piece of advice, expert number 4 recommends that opinion leaders, who spread the word to the world, should be created. This would achieve much more than paid advertisements. This opinion coincides with the statements of expert number 3.

In addition to the "human factor", expert number 5 also states that a unique location can contribute to brand awareness.

Question number 5 can be summarised as follows: The personality of the winegrower per se is a criterion for success and it also has a decisive influence on the perception of the business by the customer. Opinion leaders and influencers as well as the network in one's own region contribute to the success of a winery, just like positive awareness and respect for one's competitors.

Question number 6: How do you assess the position of "marketing" of non-owner-managed wineries?

Question number 6 explores the importance of marketing in non-owner managed businesses.

Expert number 1 is certain that the position of marketing is better in non-owner-run businesses, as it can be made more sober and objective-oriented and professional services are more likely to be bought in when needed. They are also freer to make decisions on product range management, as there is generally less emotion involved than in owner-managed wineries. Expert number 2 also emphasises the professional approach to marketing activities. He sees the great advantage of institutional wineries in the professional filling of marketing and sales positions, which has positive effects, such as the rapid processing of enquiries and also the conscious management of sales. However, he points out that the position of marketing is better with those wineries that are of a corresponding size and therefore can produce a certain amount of wine. A further advantage of institutionally managed wineries is the possibility of clearly separating business areas, also in terms of personnel. With smaller sizes, family-run wineries are at an advantage because the market believes that the producer family can be trusted more, and the customers have the feeling that they have discovered something themselves and support the family directly by buying the wines there. He points out, however, that this peculiarity could be specific to Austria, as he has not had such experiences in Germany or the USA. This could be related to the size of the country and the fact that many wineries arose from a mixed agricultural sector and that prosperity and success in the Austrian wine industry are still relatively new concepts. Expert number 3 considers the importance of marketing to be just as important for non-owner-managed farms as for family-run wineries. However, he considers it important to focus on the people of the winery and to highlight them, even in the case of institutional wineries, because it is the story of the people and the winery that counts. According to expert number 4, marketing is immensely important for non-owner-managed wineries, even more compared to owner-managed wineries, because more needs to be done to build the brand and the brand needs to be promoted more because there is no such thing as a strong reference person. These wineries also have to face additional challenges, such as changing personnel. For these reasons, marketing has an overriding role for institutional operations. He recommends showing the people behind the product, who have another task that family members of a wine business do not have, namely, to develop and consistently continue the brand. Expert number 5 states that such enterprises require special fine-tuning in the general management and therefore also in the field of marketing in order to be able to work successfully.

In summary, it can be said that the position of marketing in non-owner-managed wineries is clearly seen as better by the experts and also as more important in comparison to family-run wineries. The parameters cited are a more professional approach, less emotional attachment and the possibility of separating business units. The original lack of a figurehead, which can be built up through marketing communication activities, and the associated brand building are identified as challenges.

Question number 7: In your opinion, are cooperatives and wineries that are not owner-managed disadvantaged in terms of marketing? And if so, why?

Question number 7 takes this issue further and asks whether non-owner-managed farms are disadvantaged in terms of marketing.

According to expert number 1, this question is to be answered with a clear "No". In his opinion they are even more on advantage in terms of marketing. Expert number 2 distinguishes in terms of the size of the winery: smaller companies are on advantage as family-run wineries, while large farms are on advantage if they are managed institutionally. Expert number 3 also sees no disadvantage in marketing communication if the intangible personality is replaced accordingly. Expert number 4 also does not see any disadvantage in marketing communication either; it is simply necessary to define different objectives and to look at certain parameters differently. One cannot refer to personality and history, but one can put other areas in the foreground, such as the cellar master, the sites or the relationship with the partners. The brand should be put in the centre, then these companies are not worse off. Expert number 5 describes the challenges of institutional businesses, namely that a figurehead who can serve as a communicator and projection screen for the brand is missing. However, this can be counteracted by defining appropriate people in the company who will maintain long-term contact with the individual target groups of the winery and create familiarity with the brand. Operational decisions often take longer in such companies, as they have to be voted on in committees. Short-term strategic changes of course are also more difficult. As a consequence, these companies must plan more carefully for the long term. Cooperatives often have to market a wide range of wine styles, which makes it difficult to sharpen brand communication, but it is precisely this facet that can ensure a broader market presence, as many segments can be successfully served with clear portfolio design, appropriate quality control and pricing. If there is clean segmentation, an advantage can also be gained from the operational structure.

In general, it can be said that the experts do not identify any marketing communication disadvantage for non-owner-managed wineries in Austria. Institutional wineries, in particular, would even have many advantages. Family-run wineries with a small business size would still have an advantage, however, larger wineries would have better chances when managed institutionally. However, the prerequisites for taking advantage of these opportunities are a strategy tailored to the respective structure of the winery, the corresponding objectives and long-term planning. The experts advise that in the case of non-owner-run wineries, the brand should be the focus of attention on the one hand, and on the other hand, a figurehead should be defined that represents the winery in the long term.

Question number 8: What are the current trends in the Austrian wine industry, and should winegrowers take them up?

Question number 8 aimed to identify current trends in the Austrian wine industry.

Expert number 1 cites the winery's motivation as the most important prerequisite for jumping on trends. If the winery can stand behind the trend and if the trend fits the philosophy, there is nothing wrong with it, but it must be communicated accordingly. In terms of wine style, orange and natural wines are currently in vogue. Expert number 1 identified another trend in the product range, namely, to carry a premium article in the assortment. This so-called premiumization is important for wineries in order to strengthen their brand, even if this wine does not sell well. Sustainability already flows into the standard and the emphasis on origin and regionality is already expected by customers and can no longer be called a trend.

Expert number 2 is convinced that there are always trends and that the new generation must be addressed right now. He sees the trend towards lower alcohol content, more structure, elegance and authenticity. The winery should be reflected in its products, and the wine growing area should also be recognisable, and production should be done as close to nature as possible. He says that there should be a move away from everything exaggerated, towards a style that is more "casual", but with top quality. Expert number 2's opinion is completely in line with expert number1's opinion on when to follow a trend. Expert number 2 is also of the opinion that you have to define who you are as a company and also as a person. Both the person and the products need to be of a certain style. Within this area, you can move and experiment, but whatever you do, it has to match the brand. This also applies to the "orange wines" trend he identified, but especially with this trend one should be aware that this market segment only appeals to a small group and that this group is not loyal, but very experimental. This type of wine is an addition to the regular range and certain learnings, such as maceration times also for white wines, can then be incorporated into conventional production. One can always learn something and if wine is in conversation, then that is good. One should approach everything with professionalism. In general, he considers every movement in the wine industry to be good. For expert number 3, organic winegrowing is contemporary and also important. According to him, all the major well-known companies worldwide cultivate their vineyards organically. Another important trend is the rosé wine, also aged in barrique barrels. Expert number 4 identifies environmental awareness as a global trend and gives Austria good marks for this. The most important thing is that the winery remains authentic and chooses the form of environmentally conscious work that suits it best. As a further trend, expert number 4 names sparkling wine. The Austrian wine industry has already made a good step with the so-called "sparkling wine pyramid" and now it is the task of the winegrowers to fill it with life. This applies not only to the big players in the sparkling wine sector, but also to winegrowers who can offer an additional product in their range. According to expert number 4, rosé wine is another trend: While rosé wines have a 20% market share in some markets (Great Britain, for example), the share in Austria is less than 5%. This is a coming trend that will allow to attract new customers. However, the product "rosé wine" should not be made as a by-product, but actively. Furthermore, expert number 4 states that a long-lasting trend – as the figures also prove – is the rate of increase in white wine and the stagnation or slight decline in the red wine segment. The reason for this could be health awareness (intolerance of red wine; light cuisine goes better with white wine) as well as the extremely high quality of Austrian white wines. Origin and typicity for a certain area are a long-lasting trend in the Austrian wine sector, so expert number 4. Expert number 5 summarizes the trends mentioned above: currently the topics sustainable and organic viticulture, natural and orange wines, rosé wines, wines with lower alcohol content and a focus on autochthonous grape varieties and typicity of origin would be in trend. In the opinion of expert number 5, it is important to be able to integrate a trend into the company's philosophy and to make it economically viable. When it comes to identifying trends, the experts agree: currently, the Austrian wine industry is concerned with sustainability and organic viticulture, authenticity and origin. In the wine style sector, orange wine continues to be the trend, while rosé, sparkling wine and wines with lower alcohol content and more structure also score points among Austrian winegrowers. All experts are of the opinion that no matter which trend a winemaker wants to follow it must fit the philosophy of the winery.

The last two questions were only answered by four of the experts, as interviewee number 5 was biased due to his professional position and therefore refused to answer.

Question number 9: Which five Austrian winemakers are most successful in your opinion and why?

According to expert number 1, the most successful winegrowers in Austria are Scheiblhofer, Domäne Wachau, Silvia Heinrich, Leberl and Meinklang. The reasons behind shall be explained: In his opinion, Scheiblhofer understands how to produce wines for the market as it is now and the persons in charge of Domäne Wachau have led a cooperative to a time when competition is tough and get good ratings, even in international markets. When it comes to Silvia Heinrich, he states that she is very successful abroad, especially in Asia, whereas Leberl has made the most of the soil and the region in a difficult situation (after the death of his brother)

and makes incredibly good wines. He proceeds very systematically and learns from his mistakes. Subsequently, expert number 1 explains why Meinklang is successful in his opinion: They were the first to market orange wines and continue to do so very successfully.
Additionally, expert number one mentions the young generation of winegrowers. They are top producers and do not hesitate to try something new.

Expert number 2 names not only 5, but 14 wineries that are successful in his opinion. According to expert number 2, Mayer am Pfarrplatz has to be mentioned in this context as they have created an institutional winery from scratch and are very successful, both economically and in terms of awareness and branding. They are a role model for institutional wineries. When it comes to the next mentioned winery, Domäne Wachau, he agrees with expert number 1: Domäne Wachau have managed to extend the image of the very small businesses to a large producer. They have economic success and brand awareness. They are also located in the higher-priced range and have not gone into the masses. Then, Bründlmayer and Schloss Gobelsburg are mentioned. Both are said to be extremely successful in terms of market presence and relationship with sales partners. The next names stated by expert number 2 are Jurtschitsch, who is qualitatively exciting, young and dynamic and Fred Loimer, who is right in between: He has a good relationship with distribution partners and always tries new and exciting things. The next three mentioned wineries are Scheiblhofer, Salzl and Reeh. Those three recognised the opening of the market segment and went into it. When it comes to international success, expert number 2 goes with Velich, Prieler and Nittnaus. By taking a look at new media, Gut Oggau and Renner Sisters were mentioned, as they are well represented in the young media.
In addition, expert number 2 mentions the wine growing region of Eisenberg, whose wineries managed to work together and also the wine growing region of Styria, who have managed to establish a brand together and it is exemplary how the inter-generational company transfers have worked there. They have still lifted their companies at the time of the transfer, in terms of valuation and are financially very well off.

According to expert number 3, the most successful Austrian wineries are Gernot Heinrich Bründlmayer, Scheiblhofer, Reeh and Zillinger. All of them convince by their overall presence in a high-quality area, in good restaurants, at home and abroad. Also, the consistent quality of the wines and the consistent pursuit of their philosophy have to be mentioned. These five never change their style. The customers know what they get and can rely on it. Consistency is a keyword and also a secret of success.

The most successful Austrian wineries, according to expert number 4, are Kollwentz, Ott, Scheiblhofer, Gesellmann and Tement. Kollwentz was chosen because he has probably the highest average price level over the whole range and works without compromise: the name Kollwentz stands for quality and that with white, red and sweet wines, which is unique. He is keeping cuvées with international grape varieties in vogue. The second name mentioned was Bernhard Ott. He managed to incorporate his strength into the business model. He concentrates almost exclusively on Grüner Veltliner, but also tries out other things and discards them again if they don't fit. He is economically extremely successful. When it comes to the Scheiblhofer winery, expert number 4 explains that Austria sells extremely large quantities of wine within its domestic market and Scheiblhofer has developed extremely well over the last 20 years and is well established. Expert number 4 names Albert Gesellmann as being successful in the Austrian wine sector because he comes from an area that is not in vogue, and where many have not yet managed the style revolution. But he has managed to remain true to his style and to play at the top in the white, red and sweet wine sector. The last-mentioned successful winery was Tement. He is said to be extremely established and to make sensational wines. After the handover of the winery to his son, who completely changed the segment, the winery perhaps is even more successful than before.

These wineries, which the experts consider most successful, have a number of things in common – despite different nominations. All the wineries mentioned have understood their market or market segment and know how to communicate with it. They have built up their brand, gained brand awareness and are economically successful. The experts think they know the reasons behind: all mentioned wineries continuously evaluate their work, and have clear visions, as well as objectives. They are open to changes and trends, ready to learn from mistakes and remain true to themselves.

Question number 10: Which Austrian winery has, in your opinion, the strongest brand and why?

The last question was addressed to the strongest brands in the Austrian wine industry.

According to expert number 1, the strongest brand is Domäne Wachau. They are present everywhere and still manage not to get on your nerves. They are very likeable and have good ratings, also in international markets. Their wines are consumed by everybody.

Expert number 2 first thought of Scheiblhofer, Hillinger and Lenz Moser, who are very active in the broad segment. Lenz Moser has great brand awareness, but a strong brand also means brand value. For this reason, expert number 2 also goes with Domäne Wachau, because this brand is most needed in the assortments of retailers.

According to expert number 3, the strongest brand in the Austrian wine business is Bründlmayer. Everybody knows him and everyone knows him with regard to high quality wines. The reason for his strength is consistency, quality and that he is always modern. He never stands still; he works organically and wants to push the spirit of the times. He is a visionary. He is interested in the industry and he stays connected to his roots. Consistency is also evident in his work: he has hired a number of staff, is present abroad, at tastings, is always developing, and his sparkling wine is also doing very well.
Scheiblhofer is the strongest brand, according to expert number 4. He focuses on the domestic market and is extremely present in the areas of specialised trade, gastronomy and food retailing. He is also very present in the media, both online and in magazines.

The question of the strongest brand shows some similarities and parallels to the most successful companies. The characteristics of the strongest brand in the Austrian wine industry are presence and awareness, good ratings, a high position within the reseller network, consistency, continuous development, visions, and, last but not least, deep understanding of the market.

Questionnaire of the end customer survey

A Consumer behaviour

1. Where and how often do you buy wine?
2. If you buy wines online, where do you do it?
3. Has your drinking behaviour changed in recent years?
4. Do you inform yourself about the wines you consume and if so, how?
5. Do you attend events that are related to wine, e.g. wine dinners, tastings, harvest festivals?
6. Do you visit wine fairs?
7. Do you inform yourself about certain winemakers/wineries and if so, in which channels?
8. Which winemakers/wineries do you follow on social media or which ones have you subscribed to newsletters from?

B Purchase criteria

9. How important for you are when buying wine: Price | Grape Variety | Wine-growing region | Winery/wine grower | Advice from the sales personnel in the trade or winery?
10. In which price range are most wines you buy?
11. Which factors are decisive for you to taste wines?

C Product characteristics

12. From which countries do you buy wine?
13. Which trends in the domestic wine scene do you know?
14. Have you ever heard of the following trends? Biodynamics | Organic-biological viticulture | Sustainability in production and sales | Orange, natural and raw wines & Pet Nats | Autochthonous grape varieties | Special types of finishing works, e.g. concrete egg

D Names and brands

15. Do you know the following Austrian winegrowers and wineries? Scheiblhofer winery | Tement winery | Esterházy winery | Domäne Wachau | Weinlaubenhof Kracher | Netzl winery | Strehn winery
16. Do you know other Austrian winemakers/wineries? Which ones?

E Demographic data

17. You are… (Age)
18. Your highest completed education
19. Your gross monthly income

Auxiliary tables for cross tabulations

Relation between the shopping location "winery" and the changing of drinking behaviour of the respondents

	Has your drinking behaviour changed in recent years and if so, how?						
	Yes, I drink more wine. [1]	Yes, I drink less wine. [2]	Yes, I drink more expensive wines. [3]	Yes, I drink cheaper wines. [4]	Yes, I drink different products. If yes, which? [5]	No [6]	Total
at the winery							
never [1]	16	11	12	0	10	16	65
	17,79	8,68	13,97	0,42	6,78	17,36	
	5,21%	3,58%	3,91%	0,00%	3,26%	5,21%	
once a year [2]	33	19	33	0	10	36	131
	35,84	17,50	28,16	0,85	13,65	34,99	
	10,75%	6,19%	10,75%	0,00%	3,26%	11,73%	
every other month [3]	26	8	12	0	6	22	74
	20,25	9,88	15,91	0,48	7,71	19,77	
	8,47%	2,61%	3,91%	0,00%	1,95%	7,17%	
once a month [4]	8	2	5	2	3	3	23
	6,29	3,07	4,94	0,15	2,40	6,14	
	2,61%	0,65%	1,63%	0,65%	0,98%	0,98%	
several times a month [5]	1	1	4	0	3	5	14
	3,83	1,87	3,01	0,09	1,46	3,74	
	0,33%	0,33%	1,30%	0,00%	0,98%	1,63%	
Total	84	41	66	2	32	82	307

Chi-square	40,666	● Observed number
degrees of freedom	20	● Expected number
p-value	0,004	● Percent of total

Table 19: Relation between the shopping location "winery" and the changing of drinking behaviour of the respondents. Source: Own survey

Interpretation of the cross table:

65 people indicate that they never buy from the winery. Of these, 16[38] say they drink more wine and 16[39], too, have experienced no change in their drinking behaviour. 12[40] people claim to drink more expensive wines. Of those who shop at the winery once a year (131), 36 have not noticed any change in their drinking behaviour and 33[41] each say they consume more wine and more expensive wines. Of the 74 people who shop at the winery every other month, 26 say they drink more wine, 22 have not noticed any change in their drinking behaviour and 12[42] claim to consume more expensive wines. 23 people shop at the winery once a month. 8 of them claim that they drink more wine and 5 drink more expensive wines. Of the 14 people who state that they shop at the winery several times a month, 5 report that their drinking behaviour has not changed. The expected number of this and of other statements are very low (below 5), and the results can therefore not be considered representative.

[38] expected number 17.79

[39] expected number 17.36

[40] expected number 13.97

[41] expected number 35.84 with "more wine"

[42] expected number 15.91

Relation between the shopping location "specialised wine trade" and the procurement of information about wines

	Do you inform yourself about the wines you consume and if so, how?							
	Yes, via awards [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, in magazines [4]	Yes, on the website of the winery/producer/ retailer [5]	Yes, through personal advice in the specialised trade/winery [6]	No [7]	Total
Specialised wine trade (e.g.Wein Co, Ammersin, etc.)								
never [1]	13 13,89 2,71%	10 21,64 2,08%	4 9,04 0,83%	13 16,79 2,71%	23 26,16 4,79%	41 43,27 8,54%	51 24,22 10,63%	**155**
once a year[2]	16 16,30 3,33%	35 25,40 7,29%	9 10,62 1,88%	18 19,72 3,75%	32 30,71 6,67%	54 50,81 11,25%	18 28,44 3,75%	**182**
every other month [3]	10 9,05 2,08%	15 14,10 3,13%	11 5,89 2,29%	13 10,94 2,71%	20 17,04 4,17%	26 28,20 5,42%	6 15,78 1,25%	**101**
once a month[4]	2 1,88 0,42%	3 2,93 0,63%	3 1,23 0,63%	5 2,28 1,04%	2 3,54 0,42%	6 5,86 1,25%	0 3,28 0,00%	**21**
several times a month [5]	2 1,88 0,42%	4 2,93 0,83%	1 1,23 0,21%	3 2,28 0,63%	4 3,54 0,83%	7 5,86 1,46%	0 3,28 0,00%	**21**
Total	**43**	**67**	**28**	**52**	**81**	**134**	**75**	**480**

Chi-square	73,960	● Observed number
degrees of freedom	24	● Expected number
p-value	0,000	● Percent of total

Table 20: Relation between the shopping location "specialised wine trade" and the procurement of information about wines. Source: Own survey

Interpretation of the cross table:

Of those people who state that they never shop in the specialised wine trade (155), 51 state that they do not inform themselves about wines. 41[43] state that they obtain information through advice at wine shops and 23[44] mention the website of the winery, producer or retailer as a source of information. The picture is slightly different for people who shop in the specialised wine trade once a year (182): in this case, 54 say they obtain information through advice, 35 inform themselves at events, and 32 indicate to use the winery's website. In the case of purchases made in the specialised wine trade every other month, the persons concerned (26)[45] say that they obtain information primarily through advice, secondly through the website (20) and thirdly at events (15). The expected number of people who purchase wine in the specialised trade once a month or even several times a month and who inform themselves about wine via awards, at events, at trade fairs, in magazines, on the website or not at all is relatively small (below 5). Therefore, these results may not be representative.

[43] expected number 43.27
[44] expected number 26.16
[45] expected number 28.20

Relation between the shopping location "winery" and the procurement of information about wines

	Do you inform yourself about the wines you consume and if so, how?							
	Yes, via awards [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, in magazines [4]	Yes, on the website of the winery/producer/ retailer [5]	Yes, through personal advice in the specialised trade/winery [6]	No [7]	Total
at the winery								
never [1]	5	3	3	4	10	10	36	71
	6,36	9,91	4,14	7,69	11,98	19,82	11,09	
	1,04%	0,63%	0,63%	0,83%	2,08%	2,08%	7,50%	
once a year [2]	19	33	10	25	33	60	27	207
	18,54	28,89	12,08	22,43	34,93	57,79	32,34	
	3,96%	6,88%	2,08%	5,21%	6,88%	12,50%	5,63%	
every other month [3]	10	20	10	13	27	43	9	132
	11,83	18,43	7,70	14,30	22,28	36,85	20,63	
	2,08%	4,17%	2,08%	2,71%	5,63%	8,96%	1,88%	
once a month [4]	5	5	3	4	5	13	2	37
	3,31	5,16	2,16	4,01	6,24	10,33	5,78	
	1,04%	1,04%	0,63%	0,83%	1,04%	2,71%	0,42%	
several times a month [5]	4	6	2	6	6	8	1	33
	2,96	4,61	1,93	3,58	5,57	9,21	5,16	
	0,83%	1,25%	0,42%	1,25%	1,25%	1,67%	0,21%	
Total	**43**	**67**	**28**	**52**	**81**	**134**	**75**	**480**

Chi-square	91,013	● Observed number
degrees of freedom	24	● Expected number
p-value	0,000	● Percent of total

Table 21: Relation between wine purchases at a winery and the procurement of information for wines. Source: Own survey

Interpretation of the cross table:

Of the people who never buy directly from the winery (71), 36 state that they do not inform themselves about wine, and 10 each state personal advice[46] and events[47] as a channel for information on wines. The largest group, with 207 entries, is made up of people who shop at the winery once a year. Of these people, 60 say that they obtain information about wines through personal advice at the winery, and 33 each mention the website[48] and events as a source of information. The group of people who buy directly from the winery every other month comprises 132 entries. Of these, 43 state that they seek personal advice on wines, 27 mention the website as a source of information and 20 mention events. When it comes to purchases at the winery, which take place once a month, 13 of 37 respondents cite personal advice as a source of information about wines and 5 each cite the website[49], events[50] and awards. 33 persons state that they shop at the winery several times a month. Of these, 8[51] indicate personal advice as a source of information, and 6 each state the website, events and magazines. As the expected number of the last group mentioned (magazines and events) is below 5, results may not be representative.

[46] expected number 19.82
[47] expected number 11.98
[48] expected number 34.93
[49] expected number 6.24
[50] expected number 5.16
[51] expected number 9.21

Relation between the shopping location "wine shop" and the procurement of information about wines

at a wine shop	Yes, via awards [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, in magazines [4]	Yes, on the website of the winery/producer/ retailer [5]	Yes, through personal advice in the specialised trade/winery [6]	No [7]	Total
	Do you inform yourself about the wines you consume and if so, how?							
never [1]	17 17,29 3,54%	14 26,94 2,92%	3 11,26 0,63%	16 20,91 3,33%	30 32,57 6,25%	49 53,88 10,21%	64 30,16 13,33%	193
once a year [2]	19 16,93 3,96%	38 26,38 7,92%	12 11,03 2,50%	20 20,48 4,17%	34 31,89 7,08%	57 52,76 11,88%	9 29,53 1,88%	189
every other month [3]	5 5,64 1,04%	10 8,79 2,08%	9 3,68 1,88%	9 6,83 1,88%	10 10,63 2,08%	18 17,59 3,75%	2 9,84 0,42%	63
once a month [4]	0 1,08 0,00%	0 1,68 0,00%	2 0,70 0,42%	3 1,30 0,63%	2 2,03 0,42%	5 3,35 1,04%	0 1,88 0,00%	12
several times a month [5]	2 2,06 0,42%	5 3,21 1,04%	2 1,34 0,42%	4 2,49 0,83%	5 3,88 1,04%	5 6,42 1,04%	0 3,59 0,00%	23
Total	43	67	28	52	81	134	75	480

Chi-square	103,764	● Observed number
degrees of freedom	24	● Expected number
p-value	0,000	● Percent of total

Table 22: Relation between wine purchases at a wine shop and the procurement of information about wines.
Source: Own survey

Interpretation of the cross table:

193 people, which is the largest group, state that they do not shop at wine shops. Of these, 64 indicate that they do not obtain information about wines, 49[52] mention personal consultations as a source of information and 30[53] mention the website of the winery or retailer. Of those who say that they buy at a wine shop once a year (189), 57 inform themselves via personal advice, 38 at events and 34 on the website of the winery or retailer. 63 persons state that they buy at a wine shop every other month. Of these, 18 mention personal consultation as a source of information, and 10 each state that they obtain information about wines at events and on the website[54].

The expected number of people who buy their wines at a wine shop once a month und who state to inform themselves about wines via awards, at events, at trade fairs, in magazines, on the website or who do not inform themselves at all is below 5 and may therefore not be representative. The expected number of the people who buy at a wine shop several times a month and inform themselves via awards, at events, at trade fairs, in magazines, on the website and who do not inform themselves at all is comparatively low (below 5). For this reason, these results may also suffer from a lack of representativeness.

[52] expected number 53.88
[53] expected number 32.57
[54] expected number 10.63

Relation between the shopping location "specialised wine trade" and the attendance at wine-related events

	Specialised wine trade (e.g. Wein Co, Ammersin, etc.)					
	never [1]	once a year [2]	every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?						
Yes, once a month [1]	2 3,92 0,75%	4 3,32 1,50%	0 1,29 0,00%	1 0,24 0,38%	2 0,24 0,75%	9
Yes, several times a year [2]	11 30,09 4,14%	32 25,42 12,03%	19 9,86 7,14%	3 1,82 1,13%	4 1,82 1,50%	69
Yes, once a year [3]	35 38,81 13,16%	40 32,79 15,04%	11 12,71 4,14%	3 2,34 1,13%	0 2,34 0,00%	89
No [4]	68 43,17 25,56%	22 36,47 8,27%	8 14,14 3,01%	0 2,61 0,00%	1 2,61 0,38%	99
Total	**116**	**98**	**38**	**7**	**7**	**266**

Chi-square	74,651	● Observed number
Degrees of freedom	12	● Expected number
p-value	0,000	● Percent of total

Table 23: Relation between attending wine-related events and the purchase of wine in the specialised wine trade. Source: Own survey

Interpretation of the cross table:

The number of people who state that they never buy in the specialised wine trade and never attend wine-related events is the most pronounced (68). Among the respondents who state that they buy in the specialised wine trade once a year, the number of those who also visit wine-related events once a year is the highest (40), followed by several visits to events per year (32). Among the respondents who state that they buy in the specialised wine trade every other month, the number of those who also attend wine-related events several times a year is the highest (19).

Relation between the shopping location "winery" and the attendance at wine-related events

	at the winery					
	never [1]	once a year [2]	every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?						
Yes, once a month [1]	0 1,93 0,00%	4 3,89 1,50%	4 2,20 1,50%	0 0,61 0,00%	1 0,37 0,38%	9
Yes, several times a year [2]	4 14,79 1,50%	28 29,83 10,53%	24 16,86 9,02%	6 4,67 2,26%	7 2,85 2,63%	69
Yes, once a year [3]	7 19,07 2,63%	52 38,48 19,55%	21 21,75 7,89%	7 6,02 2,63%	2 3,68 0,75%	89
No [4]	46 21,21 17,29%	31 42,80 11,65%	16 24,19 6,02%	5 6,70 1,88%	1 4,09 0,38%	99
Total	**57**	**115**	**65**	**18**	**11**	**266**

Chi-square	73,582	● Observed number
Degrees of freedom	12	● Expected number
p-value	0,000	● Percent of total

Table 24: Relation between attending wine-related events and the purchase of wine at a winery.
Source: Own survey

Interpretation of the cross table:

In the case of the 'winery' as being the place of purchase, it appears that the number of those who state that they buy from the winery once a year and also attend wine-related events once a year is highest (52), followed by those who state that they neither buy from the winery nor attend wine-related events (46). In the case of purchases made every other month, the cross table shows that, with 24 entries, the number of people claiming to attend wine-related events several times a year is highest. Persons who shop at the winery once a month claim to visit events once a year (7), or even several times a year (6). 5 people claim not to attend events at all. Among those respondents who purchase directly at the winery several times a month, most (7) state that they also attend wine-related events several times a year. As the expected number of these people is below 5, results may lack representativeness.

Relation between the shopping location "wine shop" and the attendance at wine-related events

	never [1]	once a year [2]	at a wine shop every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?						
Yes, once a month [1]	2 4,91 0,75%	2 3,01 0,75%	3 0,71 1,13%	1 0,17 0,38%	1 0,20 0,38%	**9**
Yes, several times a year [2]	12 37,61 4,51%	35 23,09 13,16%	13 5,45 4,89%	4 1,30 1,50%	5 1,56 1,88%	**69**
Yes, once a year [3]	51 48,52 19,17%	35 29,78 13,16%	3 7,03 1,13%	0 1,67 0,00%	0 2,01 0,00%	**89**
No [4]	80 53,97 30,08%	17 33,12 6,39%	2 7,82 0,75%	0 1,86 0,00%	0 2,23 0,00%	**99**
Total	**145**	**89**	**21**	**5**	**6**	**266**

Chi-square	99,820	● Observed number
Degrees of freedom	12	● Expected number
p-value	0,000	● Percent of total

Table 25: Relation between attending wine-related events and buying wine at a wine shop.
Source: Own survey

Interpretation of the cross table:

When it comes to buying wines at a wine shop and attending wine-related events, the number of those who state that they neither buy wine at a wine shop nor attend events is the most striking (80). Among the respondents who buy wines at a wine shop once a year, the same number of people (35) state that they attend wine-related events either once or several times a year. Among the respondents who shop at a wine shop every other month, those who attend wine-related events several times a year stand out (13). The expected number of respondents who state to buy at a wine shop once or several times a month is comparatively small (below 5) and therefore, the results may not be representative.

Relation between the shopping location "online" and the attendance at wine-related events

	never [1]	once a year [2]	online every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?						
Yes, once a month [1]	5 6,96 1,89%	2 1,22 0,75%	1 0,61 0,38%	0 0,07 0,00%	1 0,14 0,38%	9
Yes, several times a year [2]	39 52,60 14,72%	16 9,24 6,04%	9 4,62 3,40%	2 0,51 0,75%	2 1,03 0,75%	68
Yes, once a year [3]	77 68,85 29,06%	8 12,09 3,02%	3 6,05 1,13%	0 0,67 0,00%	1 1,34 0,38%	89
No [4]	84 76,58 31,70%	10 13,45 3,77%	5 6,72 1,89%	0 0,75 0,00%	0 1,49 0,00%	99
Total	**205**	**36**	**18**	**2**	**4**	**265**

Chi-square	33,643	● Observed number
Degrees of freedom	12	● Expected number
p-value	0,001	● Percent of total

Table 26: Relation between attending wine-related events and online wine purchasing.
Source: Own survey

Interpretation of the cross table:

The test persons who state that they never buy wines online and do not attend wine-related events dominate (84). Among people who report buying wine online once a year, the group that is most represented is that of who attend wine-related events several times a year (16). Among those people who purchase wine online every other month (18), most respondents (9) state to attend wine-related events several times a year. However, this cell has an expected number of below 5, which means that results may not be representative. The expected number of respondents who state to buy online once or more often a month is comparatively small (below 5) and therefore, results may also suffer from a lack of representativeness.

Spearman`s rank correlations (Rho)

Correlation between shopping the location "specialised wine trade" and the attendance of events

Spearman's rank correlation (Rho)

	Specialised wine trade (e.g. Wein Co, Ammersin, etc.)	Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?
Specialised wine trade (e.g. Wein Co, Ammersin, etc.)	—	
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?	-0,438 < 0.001 266	—

● Spearman's Rho
● p-value
● N

Table 27: Spearman's rank correlation between attending wine-related events and buying wine in the specialised wine trade. Source: Own survey

Correlation between the shopping location "winery" and the attendance of events

Spearman's rank correlation (Rho)

	at the winery	Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?
at the winery	—	
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?	-0,399 < 0.001 266	—

● Spearman's Rho
● p-value
● N

Table 28: Spearman's rank correlation between attending wine-related events and buying wine at a winery. Source: Own survey

Correlation between the shopping location "wine shop" and the attendance at wine-related events

Spearman's rank correlation (Rho)

	at a wine shop	Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?
at a wine shop	—	
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?	-0,540 < 0.001 266	—

● Spearman's Rho
● p-value
● N

Table 29: Spearman's rank correlation between attending wine-related events and buying wine at a wine shop.
Source: Own survey

Correlation between the shopping location "online" and the attendance at wine-related events

Spearman's rank correlation (Rho)

	online	Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?
online	—	
Do you attend events related to wine, such as wine dinners, tastings, harvest festivals, etc.?	-0,256 < 0.001 265	—

● Spearman's Rho
● p-value
● N

Table 30: Spearman's rank correlation between attending wine-related events and buying wine online.
Source: Own survey

Relation between the shopping location "specialised wine trade" and the attendance at wine fairs

	Specialised wine trade (e.g. Wein Co, Ammersin, etc.)					Total
	never [1]	once a year [2]	every other month [3]	once a month [4]	several times a month [5]	
Do you attend wine fairs?						
Yes, several times a year [1]	1	12	7	4	2	**26**
	11,34	9,58	3,71	0,68	0,68	
	0,38%	4,51%	2,63%	1,50%	0,75%	
Yes, once a year [2]	7	15	7	1	3	**33**
	14,39	12,16	4,71	0,87	0,87	
	2,63%	5,64%	2,63%	0,38%	1,13%	
No [3]	108	71	24	2	2	**207**
	90,27	76,26	29,57	5,45	5,45	
	40,60%	26,69%	9,02%	0,75%	0,75%	
Total	**116**	**98**	**38**	**7**	**7**	**266**

Chi-square	51,623	● Observed number
Degrees of freedom	8	● Expected number
p-value	0,000	● Percent of total

Table 31: Relation between attending wine fairs and wine purchases in the specialised wine trade. Source: Own survey

Interpretation of the cross table:

Among those respondents who state that they never buy in the specialised wine trade, the group who state that they never attend a trade fair is the largest (108), followed at a large distance by those who attend a trade fair once a year. Among the respondents who buy in the specialised wine trade once a year, the highest number of people (71[55]) also stated that they never attend a trade fair, followed by attending a trade fair once a year (15) and several visits to trade fairs per year (12). The third group – those who buy in the specialist wine trade every other month – shows a similar picture. Out of 38 people, 24[56] state that they do not attend a trade fair. 7 persons each visit a wine fair once a year or several times a year, but the expected numbers are below 5 and therefore, the results may not be representative. The expected number of test persons who state that they buy in the specialist wine trade once or several times a month and attend wine fairs once or several times a year is comparatively low (below 5) and therefore, results may suffer from a lack of representativeness.

55 expected number 76.26

56 expected number 29.57

Relation between the shopping location "wine shop" and the attendance at wine fairs

	never [1]	once a year [2]	at a wine shop every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend wine fairs?						
Yes, several times a year [1]	4 14,17 1,50%	8 8,70 3,01%	8 2,05 3,01%	3 0,49 1,13%	3 0,59 1,13%	**26**
Yes, once a year [2]	6 17,99 2,26%	18 11,04 6,77%	6 2,61 2,26%	1 0,62 0,38%	2 0,74 0,75%	**33**
No [3]	135 112,84 50,75%	63 69,26 23,68%	7 16,34 2,63%	1 3,89 0,38%	1 4,67 0,38%	**207**
Total	**145**	**89**	**21**	**5**	**6**	**266**

Chi-square	81,867	● Observed number
Degrees of freedom	8	● Expected number
p-value	0,000	● Percent of total

Table 32: Relation between attending wine fairs and buying wine at a wine shop.
Source: Own survey

Interpretation of the cross table:

Among the respondents who state that they never shop at a wine shop (145), most of them (135) indicate that they never attend wine fairs. In the group of those who buy at a wine shop once a year (89), the majority (63[57]) of the respondents also say that they do not attend wine fairs, followed by the number of those who attend a wine fair once a year. Among those participants who make purchases at a wine shop every other month (21), the group of people who visit wine fairs several times a year is the largest (8), but the expected number is below 5, which means that the results may not be representative. The expected number of respondents who state that they buy at a wine shop once or more often a month is also below 5 and therefore, the results may not be representative, either.

[57] expected number 69.26

Relation between the shopping location "online" and the attendance at wine fairs

	never [1]	once a year [2]	online every other month [3]	once a month [4]	several times a month [5]	Total
Do you attend wine fairs?						
Yes, several times a year [1]	12 20,11 4,53%	7 3,53 2,64%	4 1,77 1,51%	1 0,20 0,38%	2 0,39 0,75%	**26**
Yes, once a year [2]	17 25,53 6,42%	13 4,48 4,91%	1 2,24 0,38%	1 0,25 0,38%	1 0,50 0,38%	**33**
No [3]	176 159,36 66,42%	16 27,98 6,04%	13 13,99 4,91%	0 1,55 0,00%	1 3,11 0,38%	**206**
Total	**205**	**36**	**18**	**2**	**4**	**265**

Chi-square	51,795	● Observed number
Degrees of freedom	8	● Expected number
p-value	0,000	● Percent of total

Table 33: Relation between visits to wine fairs and online wine purchases.
Source: Own survey

Interpretation of the cross table:

When it comes to online wine purchases, it appears that within the group of people who say that they never buy online (205), the group of those who do not attend wine fairs is the largest (176). Also, among the group of respondents who make online wine purchases once a year (36), the proportion of those who do not attend wine fairs is the largest (16[58]), followed by those who attend a trade fair once a year (13). In the case of online purchases of wine every other month, those who do not attend a trade fair again show the highest number (13[59]), followed by those who attend a wine fair several times a year (4). The expected number of respondents who state that they buy online once or more often a month is below 5 and therefore, the results may not be representative.

[58] expected number 27.98

[59] expected number 13.99

Spearman's rank correlations

Correlation between the shopping location "specialised wine trade" and the attendance at wine fairs

Spearman's rank correlation (Rho)

	Specialised wine trade (e.g. Wein Co, Ammersin, etc.)	Do you attend wine fairs?
Specialised wine trade (e.g. Wein Co, Ammersin, etc.)	—	
Do you attend wine fairs?	-0,381 < 0.001 266	—

- Spearman's Rho
- p-value
- N

Table 34: Correlation between visits to wine fairs and wine purchases in the specialised trade.
Source: Own survey

Correlation between the shopping location "winery" and the attendance of wine fairs

Spearman's rank correlation (Rho)

	at the winery	Do you attend wine fairs?
at the winery	—	
Do you attend wine fairs?	-0,199 0,001 266	—

- Spearman's Rho
- p-value
- N

Table 35: Correlation between visits to wine fairs and wine purchases at the winery.
Source: Own survey

Correlation between the shopping location "wine shop" and the attendance at wine fairs

Spearman's rank correlation (Rho)

	at a wine shop	Do you attend wine fairs?
at a wine shop	—	
Do you attend wine fairs?	-0,476 < 0.001 266	—

● Spearman's Rho
● p-value
● N

Table 36: Correlation between visits to wine fairs and wine purchases at a wine shop.
Source: Own survey

Correlation between the shopping location "online" and the attendance at wine fairs

Spearman's rank correlation (Rho)

	online	Do you attend wine fairs?
online	—	
Do you attend wine fairs?	-0,356 < 0.001 265	—

● Spearman's Rho
● p-value
● N

Table 37: Correlation between visits to wine fairs and online wine purchases.
Source: Own survey

Relation between the shopping location "Specialised wine trade" and the procurement of information about winemakers/wineries

	Do you inform yourself about certain winemakers/wineries you consume and if so, how?					
	Yes, in (trade) journals [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, online [4]	No [5]	Total
Specialised wine trade (e.g. Wein & Co, Ammersin, etc.)						
never [1]	8	8	4	26	79	**125**
	19,02	19,70	9,17	35,33	41,78	
	2,17%	2,17%	1,09%	7,07%	21,47%	
once a year [2]	22	26	5	49	33	**135**
	20,54	21,28	9,90	38,15	45,12	
	5,98%	7,07%	1,36%	13,32%	8,97%	
every other month [3]	18	15	11	21	9	**74**
	11,26	11,66	5,43	20,91	24,73	
	4,89%	4,08%	2,99%	5,71%	2,45%	
once a month [4]	5	4	5	4	1	**19**
	2,89	2,99	1,39	5,37	6,35	
	1,36%	1,09%	1,36%	1,09%	0,27%	
several times a month [5]	3	5	2	4	1	**15**
	2,28	2,36	1,10	4,24	5,01	
	0,82%	1,36%	0,54%	1,09%	0,27%	
Total	**56**	**58**	**27**	**104**	**123**	**368**

Chi-square	105,692	● Observed number
degrees of freedom	16	● Expected number
p-value	0,000	● Percent of total

Table 38: Relation between wine purchases in the specialised wine trade and the procurement of information about wineries. Source: Own survey

Interpretation cross table:

Among the persons who never buy in the specialised wine trade (125), 79 state that they do not inform themselves about wineries or winemakers, 26[60] inform themselves online and 8 each[61] in (trade) journals and at events[62]. The largest group – those people who buy in the specialised trade once a year – comprises 135 people. Of these, 49 state that they obtain information online, 33 do not obtain information about wineries and 26 use events as an information channel about wineries. 74 persons state that they shop in the specialised wine trade every other month. Of these, 21 obtain information about wineries online, 18 in (trade) journals and 15 at events.

The expected number of people who shop in the specialised wine trade once a month and who state to inform themselves about wineries in journals, at events or at trade fairs and the expected number of people who buy in the specialised wine trade several times a month und inform themselves in journals, at events, at trade fairs and online are comparatively low (below 5). For this reason, these results may lack representativeness.

[60] expected number 35.33
[61] expected number 19.02
[62] expected number 19.70

Relation between the shopping location "winery" and the procurement of information about winemakers/wineries

at the winery	Do you inform yourself about certain winemakers/wineries you consume and if so, how? Yes, in (trade) journals [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, online [4]	No [5]	Total
never [1]	2 9,13 0,54%	1 9,46 0,27%	2 4,40 0,54%	8 16,96 2,17%	47 20,05 12,77%	60
once a year [2]	25 22,83 6,79%	23 23,64 6,25%	8 11,01 2,17%	50 42,39 13,59%	44 50,14 11,96%	150
every other month [3]	16 15,52 4,35%	22 16,08 5,98%	9 7,48 2,45%	32 28,83 8,70%	23 34,09 6,25%	102
once a month [4]	6 4,72 1,63%	6 4,89 1,63%	5 2,27 1,36%	6 8,76 1,63%	8 10,36 2,17%	31
several times a month [5]	7 3,80 1,90%	6 3,94 1,63%	3 1,83 0,82%	8 7,07 2,17%	1 8,36 0,27%	25
Total	56	58	27	104	123	368

Chi-square	81,381	● Observed number
degrees of freedom	16	● Expected number
p-value	0,000	● Percent of total

Table 39: Relation between wine purchases at a winery and the procurement of information about wineries. Source: Own survey

Interpretation of the cross table:

Among those respondents who never buy directly from a winery (60), 47 state that they do not seek information about wineries or winemakers. 8 seek information online and 2 at trade fairs [63] and in (trade) journals[64]. Among those persons who shop at a winery once a year (150), 50 look for information about wineries and winegrowers online, 44[65] are not looking for information at all and 25 use (trade) journals to gain information. Out of the 102 people who state that they buy wines at a winery every other month, 32 are looking for information online, 23 do not look for information at all[66] and 22 look for information about wineries at events. 31 people buy directly from the winery once a month. Of these, 8[67] do not obtain information about wineries and winegrowers, and 6 inform themselves via (trade) journals, at events and online[68]. 25 persons state that they purchase their wines directly at a winery several times a month. Of these, 8 respondents state that they obtain information about wineries or winegrowers online, 7 use (trade) journals as an information channel and 6 inform themselves at events. As the

[63] expected number 4.40
[64] expected number 9.13
[65] expected number 50.14
[66] expected number 34.09
[67] expected number 10.36
[68] expected number 8.76

expected number for the last-mentioned channels (trade journals and events) is below 5, results may not be representative.

Relation between the shopping location "wine shop" and the procurement of information about winemakers/wineries

	Do you inform yourself about certain winemakers/wineries you consume and if so, how?					Total
	Yes, in (trade) journals [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, online [4]	No [5]	
at a wine shop						
never [1]	12 24,35 3,26%	11 25,22 2,99%	5 11,74 1,36%	37 45,22 10,05%	95 53,48 25,82%	**160**
once a year [2]	24 18,72 6,52%	26 19,39 7,07%	6 9,02 1,63%	42 34,76 11,41%	25 41,11 6,79%	**123**
every other month [3]	12 8,37 3,26%	14 8,67 3,80%	11 4,04 2,99%	16 15,54 4,35%	2 18,38 0,54%	**55**
once a month [4]	3 1,67 0,82%	2 1,73 0,54%	2 0,81 0,54%	3 3,11 0,82%	1 3,68 0,27%	**11**
several times a month [5]	5 2,89 1,36%	5 2,99 1,36%	3 1,39 0,82%	6 5,37 1,63%	0 6,35 0,00%	**19**
Total	**56**	**58**	**27**	**104**	**123**	**368**

Chi-square	111,912	● Observed number
degrees of freedom	16	● Expected number
p-value	0,000	● Percent of total

Table 40: Relation between wine purchases at a wine shop and the procurement of information about wineries. Source: Own survey

Interpretation of the cross table:

160 respondents claim never to shop at a wine shop. Of these persons, 95 do not inform themselves about wineries or winemakers, 37[69] do so online and 12 use (trade) journals to obtain information about wineries. Out of the 123 people who say that they buy wines at a wine shop once a year, 42 gain information about wineries online, 26 at events and 25 do not look for information at all[70]. 55 respondents purchase at a wine shop every other month. Of these, 16 seek information about wineries online, 14 at events and 12 in (trade) magazines. The expected number of people who shop at a wine shop once or who shop there several times a month and who inform themselves about wineries in journals, at events and at trade fairs is comparatively low (below 5). For this reason, these results may not be representative.

[69] expected number 43.22
[70] expected number 41.11

Relation between the shopping location "online" and the procurement of information about winemakers/wineries

	Do you inform yourself about certain winemakers/wineries you consume and if so, how?					
	Yes, in (trade) journals [1]	Yes, at events [2]	Yes, at trade fairs [3]	Yes, online [4]	No [5]	Total
online						
never [1]	31 37,99 8,45%	33 39,35 8,99%	13 18,32 3,54%	60 69,88 16,35%	112 83,45 30,52%	**249**
once a year [2]	11 10,07 3,00%	14 10,43 3,81%	8 4,86 2,18%	23 18,52 6,27%	10 22,12 2,72%	**66**
every other month [3]	10 5,34 2,72%	7 5,53 1,91%	3 2,57 0,82%	14 9,82 3,81%	1 11,73 0,27%	**35**
once a month [4]	2 0,92 0,54%	1 0,95 0,27%	1 0,44 0,27%	2 1,68 0,54%	0 2,01 0,00%	**6**
several times a month [5]	2 1,68 0,54%	3 1,74 0,82%	2 0,81 0,54%	4 3,09 1,09%	0 3,69 0,00%	**11**
Total	**56**	**58**	**27**	**103**	**123**	**367**

Chi-square	52,954	● Observed number
degrees of freedom	16	● Expected number
p-value	0,000	● Percent of total

Table 41: Relation between online wine purchases and the procurement of information about wineries. Source: Own survey

Interpretation of the cross table:

249 respondents state that they never buy wine online. Of these, 112 persons do not inform themselves about wineries at all, 60[71] use online channels to search for information and 33[72] obtain information about wineries at events. 66 people buy wines online once a year. Of these persons, 23 state that they obtain information about wineries online, 14 use events as an information channel and 11 obtain information about wineries in (trade) magazines. 35 people claim to purchase wines online every other month. Of these, 14 people obtain information about wineries online, 10 in (trade) journals and 7 at events. The expected number of people who buy wines online once or several times a month is comparatively low (below 5). For this reason, these results may lack representativeness.

[71] expected number 69.88

[72] expected number 39.35

Relation between the shopping location "supermarket" and the parameter "price"

	Price				
	very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
Supermarket					
never [1]	6 9,92 2,26%	26 32,03 9,77%	18 14,66 6,77%	10 3,38 3,76%	60
once a year [2]	13 14,06 4,89%	47 45,38 17,67%	22 20,77 8,27%	3 4,79 1,13%	85
every other month [3]	14 10,92 5,26%	37 35,23 13,91%	14 16,13 5,26%	1 3,72 0,38%	66
once a month [4]	5 5,95 1,88%	23 19,22 8,65%	7 8,80 2,63%	1 2,03 0,38%	36
several times a month [5]	6 3,14 2,26%	9 10,14 3,38%	4 4,64 1,50%	0 1,07 0,00%	19
Total	44	142	65	15	266

Chi-square	26,172	● observed number
degrees of freedom	12	● expected number
p-value	0,010	● percent of total

Table 42: Relation between the shopping location "supermarket" and the parameter "price". Source: Own survey

Interpretation of the cross table:

Of those 60 people who state that they never buy wine in the supermarket, 26[73] consider the price to be rather important, 18 rather unimportant and 10 unimportant. 85 people say they buy wine in the supermarket once a year. Of these, 47 consider the price rather important, 22 rather unimportant and 13[74] very important. Of those who buy wines in the supermarket every other month (66), 37 claim that the price is rather important, and 14 each[75] consider it very important and rather unimportant. 36 people shop for wines in the supermarket once a month. 23 of these consider the price rather important, 7[76] rather unimportant and 5[77] very important. The smallest group shops for wines in the supermarket several times a month. 9[78] of these 19 people consider the price rather important, 6 very important and 4[79] rather unimportant. As the expected number of the last groups mentioned ("very important" and "rather unimportant") is below 5, results may lack representativeness.

[73] expected number 32.03
[74] expected number 14.06
[75] expected number 16.13 with "rather unimportant"
[76] expected number 8.80
[77] expected number 5.95
[78] expected number 10.14
[79] expected number 4.64

Relation between the shopping location "specialised wine trade" and the parameter "advice"

	Advice when buying wine				
	very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
Specialised wine trade (e.g. Wein & Co, Ammersin, etc.)					
never [1]	24 27,04 9,02%	36 40,56 13,53%	27 30,96 10,15%	29 17,44 10,90%	116
once a year [2]	24 22,84 9,02%	37 34,26 13,91%	28 26,16 10,53%	9 14,74 3,38%	98
every other month [3]	10 8,86 3,76%	15 13,29 5,64%	11 10,14 4,14%	2 5,71 0,75%	38
once a month [4]	1 1,63 0,38%	2 2,45 0,75%	4 1,87 1,50%	0 1,05 0,00%	7
several times a month [5]	3 1,63 1,13%	3 2,45 1,13%	1 1,87 0,38%	0 1,05 0,00%	7
Total	62	93	71	40	266

Chi-square	21,051	● observed number
degrees of freedom	12	● expected number
p-value	0,050	● percent of total

Table 43: Relation between the shopping location "specialised wine trade" and the parameter "advice". Source: Own survey

Interpretation of the cross table:

Of those who claim that they never shop in the specialised wine trade (116), 36[80] say that sales advice is rather important, 29 say it is unimportant and 27[81] consider it rather unimportant. 98 people shop in the specialised wine trade once a year. Of them, 37 consider advice rather important, 28 rather unimportant and 24 very important. Of the 38 people who shop in the specialised wine trade every other month, advice on buying wine is rather important for 15 people, rather unimportant for 11 and very important for 10. The expected number of people who buy wines at the specialised wine trade once or several times a month is comparatively low (below 5). For this reason, these results may lack representativeness.

[80] expected number 40.56

[81] expected number 30.96

Relation between the shopping location "winery" and the parameter "grape variety"

at the winery	Grape variety: very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
never [1]	13 19,93 4,89%	19 24,86 7,14%	11 7,93 4,14%	14 4,29 5,26%	57
once a year [2]	41 40,21 15,41%	53 50,15 19,92%	15 16,00 5,64%	6 8,65 2,26%	115
every other month [3]	25 22,73 9,40%	33 28,35 12,41%	7 9,04 2,63%	0 4,89 0,00%	65
once a month [4]	9 6,29 3,38%	6 7,85 2,26%	3 2,50 1,13%	0 1,35 0,00%	18
several times a month [5]	5 3,85 1,88%	5 4,80 1,88%	1 1,53 0,38%	0 0,83 0,00%	11
Total	93	116	37	20	266

Chi-square	38,805	● observed number
degrees of freedom	12	● expected number
p-value	0,000	● percent of total

Table 44: Relation between the shopping location "winery" and the parameter "grape variety". Source: Own survey

Interpretation of the cross table:

57 people claim never to shop directly at the winery. Of them, 19[82] consider the grape variety rather important, 14 consider it unimportant and 13[83] consider it very important. Of the 115 people who shop at the winery once a year, 53 consider the grape variety to be rather important, 41 to be very important and 15[84] to be rather unimportant. 65 test persons shop directly at the winery every other month. 33 of them consider the grape variety rather important, 25 very important and 7[85] rather unimportant. 18 people shop at the winery once a month. Of these, the grape variety is very important for 9 and rather important for 6[86] persons. Of the 11 people who shop at the winery several times a month, the grape variety is very and rather important for 5 people each. As the expected numbers of the last group mentioned are below 5, results may lack representativeness.

[82] expected number 24.86

[83] expected number 13.93

[84] expected number 16.00

[85] expected number 9.04

[86] expected number 7.85

Relation between the shopping location "winery" and the parameter "winery/ winegrower"

	Winery/winegrower				
	very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
at the winery					
never [1]	4 12,64 1,50%	15 21,64 5,64%	20 16,71 7,52%	18 6,00 6,77%	**57**
once a year [2]	19 25,51 7,14%	53 43,67 19,92%	37 33,72 13,91%	6 12,11 2,26%	**115**
every other month [3]	24 14,42 9,02%	26 24,68 9,77%	13 19,06 4,89%	2 6,84 0,75%	**65**
once a month [4]	9 3,99 3,38%	5 6,83 1,88%	3 5,28 1,13%	1 1,89 0,38%	**18**
several times a month [5]	3 2,44 1,13%	2 4,18 0,75%	5 3,23 1,88%	1 1,16 0,38%	**11**
Total	**59**	**101**	**78**	**28**	**266**

Chi-square	61,880	● observed number
degrees of freedom	12	● expected number
p-value	0,000	● percent of total

Table 45: Relation between the shopping location "winery" and the parameter "winery/wine-grower". Source: Own survey

Interpretation of the cross table:

57 people state that they never buy directly from the winery. For 20 of them, the winegrower/winery itself is rather unimportant, for 18 rather unimportant and for 15[87] rather important. 53 of the 115 people who buy from the winery once a year consider the parameter "winery" rather important, 37 rather unimportant and 19[88] very important. 26 people who shop at the winery every other month consider the winery rather important, 24 very important and 13[89] rather unimportant. 18 people shop at the winery once a month. For 9 of them, the parameter "winery" is very important (as the expected number is below 5, this result may not be representative) and for 5[90] rather important. 11 people shop at the winery several times a month. The expected number of people who buy wines at the winery several times a month and for who the parameter "winery" is very important, rather important, rather unimportant and unimportant is comparatively low (below 5). For this reason, these results may lack representativeness.

[87] expected number 21.64

[88] expected number 25.51

[89] expected number 19.06

[90] expected number 6.83

Relation between the shopping location "winery" and the parameter "advice"

	Advice when buying wine: very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
at the winery					
never [1]	7 13,29 2,63%	12 19,93 4,51%	23 15,21 8,65%	15 8,57 5,64%	57
once a year [2]	25 26,80 9,40%	45 40,21 16,92%	28 30,70 10,53%	17 17,29 6,39%	115
every other month [3]	16 15,15 6,02%	26 22,73 9,77%	18 17,35 6,77%	5 9,77 1,88%	65
once a month [4]	9 4,20 3,38%	6 6,29 2,26%	1 4,80 0,38%	2 2,71 0,75%	18
several times a month [5]	5 2,56 1,88%	4 3,85 1,50%	1 2,94 0,38%	1 1,65 0,38%	11
Total	62	93	71	40	266

Chi-square	31,313	● observed number
degrees of freedom	12	● expected number
p-value	0,002	● percent of total

Table 46: Relation between the shopping location "winery" and the parameter "advice".
Source: Own survey

Interpretation of the cross table:

57 respondents indicate that they never shop at the winery. For 23 of them, advice when buying wine is rather unimportant, for 15 unimportant and for 12[91] rather important. 115 people shop at the winery once a year. For 45 of them, advice on buying wine is rather important, for 28[92] rather unimportant and for 25[93] very important. Of the 65 respondents who shop at the winery every other month, 26 state that advice when shopping is rather important, 18 claim that advice is rather unimportant and 16 that it is very important. Among those 18 test persons who shop at the winery once a month, 9 consider advice very important (as the expected number is below 5, results may not be representative) and 6 important. 11 people shop at the winery several times a month and among those, 5 consider advice very important. However, the expected number of the people who shop at a winery several times a month and consider advice very important and the expected number of people who buy wines at the winery several times a month and for who the parameter "advice" is rather important, rather unimportant and unimportant are comparatively low (below 5). For this reason, these results may lack representativeness.

[91] expected number 19.93
[92] expected number 30.70
[93] expected number 26.80

Relation between the shopping location "wine shop" and the parameter "advice"

	Advice when buying wines				
	very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	Total
at a wine shop					
never [1]	19 33,80 7,14%	46 50,70 17,29%	45 38,70 16,92%	35 21,80 13,16%	145
once a year [2]	28 20,74 10,53%	39 31,12 14,66%	18 23,76 6,77%	4 13,38 1,50%	89
every other month [3]	8 4,89 3,01%	7 7,34 2,63%	5 5,61 1,88%	1 3,16 0,38%	21
once a month [4]	2 1,17 0,75%	1 1,75 0,38%	2 1,33 0,75%	0 0,75 0,00%	5
several times a month [5]	5 1,40 1,88%	0 2,10 0,00%	1 1,60 0,38%	0 0,90 0,00%	6
Total	62	93	71	40	266

Chi-square	46,460	● observed number
degrees of freedom	12	● expected number
p-value	0,000	● percent of total

Table 47: Relation between the shopping location "wine shop" and the parameter "advice".
Source: Own survey

Interpretation of the cross table:

145 people state that they never shop at the wine shop. For 46[94] of them, advice is rather important, for 45 rather unimportant and for 35 unimportant. Of the 89 test persons who shop at the wine shop once a year, advice on buying wine is rather important for 39, very important for 28 and rather unimportant for 18[95]. 21 people say they shop at the winery every other month. For 8 of them, advice when buying wine is very important (but as the expected number is below 5, this result may not be representative), for 7[96] rather important and for 5[97] rather unimportant. The expected number of people who buy wines at the wine shop once or several times a month and for who the parameter "advice" is very important, rather important, rather unimportant and unimportant is comparatively low (below 5). For this reason, these results may lack representativeness.

[94] expected number 50.70
[95] expected number 23.76
[96] expected number 7.34
[97] expected number 5.61

Relation between the shopping location "online" and the parameter "grape variety"

	Grape variety				Total
	very important [1]	rather important [2]	rather unimportant [3]	unimportant [4]	
online					
never [1]	62 71,17 23,40%	96 89,74 36,23%	30 28,62 11,32%	17 15,47 6,42%	205
once a year [2]	14 12,50 5,28%	14 15,76 5,28%	6 5,03 2,26%	2 2,72 0,75%	36
every other month [3]	14 6,25 5,28%	3 7,88 1,13%	1 2,51 0,38%	0 1,36 0,00%	18
once a month [4]	1 0,69 0,38%	0 0,88 0,00%	0 0,28 0,00%	1 0,15 0,38%	2
several times a month [5]	1 1,39 0,38%	3 1,75 1,13%	0 0,56 0,00%	0 0,30 0,00%	4
Total	92	116	37	20	265

Chi-square	25,421	● observed number
degrees of freedom	12	● expected number
p-value	0,013	● percent of total

Table 48: Relation between online shopping and the parameter "grape variety".
Source: Own survey

Interpretation of the cross table:

205 people claim that they never shop for wines online. Among those, 96 consider the grape variety to be rather important, 62[98] very important and 30 rather unimportant. 36 people state that they buy wines online once a year. For 14[99] of them each, the grape variety is very and rather important and for 6 rather unimportant. 18 people say they buy wines online every other month and for 14 of them the grape variety is very important. The expected number of people who buy wines online once or several times a month and for who the parameter "grape variety" is very important, rather important, rather unimportant and unimportant is comparatively low (below 5). For this reason, these results may lack representativeness.

[98] expected number 71.17
[99] expected number 15.76 with „rather important"

Relation between the shopping location „specialised wine trade" and the price range of the bought wines

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	**6,00 - 9,99€ [2]**	**10,00 - 14,99€ [3]**	**15,00 - 19,99€ [4]**	**more than 20,00€ [5]**	**Total**
Specialised wine tradel (e.g. Wein & Co, Ammersin, etc.)						
never [1]	14 6,98 5,26%	62 48,41 23,31%	31 43,61 11,65%	8 10,90 3,01%	1 6,11 0,38%	**116**
once a year [2]	2 5,89 0,75%	38 40,89 14,29%	46 36,84 17,29%	8 9,21 3,01%	4 5,16 1,50%	**98**
every other month [3]	0 2,29 0,00%	6 15,86 2,26%	20 14,29 7,52%	6 3,57 2,26%	6 2,00 2,26%	**38**
once a month [4]	0 0,42 0,00%	3 2,92 1,13%	1 2,63 0,38%	1 0,66 0,38%	2 0,37 0,75%	**7**
several times a month [5]	0 0,42 0,00%	2 2,92 0,75%	2 2,63 0,75%	2 0,66 0,75%	1 0,37 0,38%	**7**
Total	**16**	**111**	**100**	**25**	**14**	**266**

Chi-square	58,919	● observed number
degrees of freedom	16	● expected number
p-value	0,000	● percent of total

Table 49: Relation between the shopping location "specialised wine trade" and the price range in which wines are bought. Source: Own survey

Interpretation of the cross table:

Of those who state that they never buy in the specialised wine trade (116), 62 say they buy wines between EUR 6 and 9.99 and 31[100] between EUR 10 and 14.99. 14 people mention buying wines between EUR 2.99 and 5.99. Of those who say they buy in the specialised wine trade once a year (98), 46 purchase wines in the range of EUR 10.00 to 14.99 and 38[101] in the range of EUR 6.00 and 9.99. 38 people shop in the specialised wine trade every other month. Of these, 20 claim to buy wines between EUR 10.00 and 14.99 and 6[102] each buy wines in the ranges of EUR 6.00 to 9.99, EUR 15.00 to 19.99 and over EUR 20.00. (However, the expected number of those, who buy in the price ranges between EUR 15.00 to 19.99 and EUR over 20, is below 5 and therefore, these results may lack representativeness). 7 each claim to buy in the specialised wine trade once or more per month. Since the expected number of these purchases broken down to the individual price segments is very low (less than 5), these results may lack representativeness.

[100] expected number 43.61
[101] expected number 40.89
[102] expected number with EUR 6.00 to 9.99: 15.86

Relation between the shopping location „winery" and the price range of the bought wines

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	6,00 - 9,99€ [2]	10,00 - 14,99€ [3]	15,00 - 19,99€ [4]	more than 20,00€ [5]	Total
at the winery						
never [1]	9	23	19	3	3	57
	3,43	23,79	21,43	5,36	3,00	
	3,38%	8,65%	7,14%	1,13%	1,13%	
once a year [2]	2	54	43	14	2	115
	6,92	47,99	43,23	10,81	6,05	
	0,75%	20,30%	16,17%	5,26%	0,75%	
every other month [3]	4	26	25	5	5	65
	3,91	27,12	24,44	6,11	3,42	
	1,50%	9,77%	9,40%	1,88%	1,88%	
once a month [4]	1	7	7	1	2	18
	1,08	7,51	6,77	1,69	0,95	
	0,38%	2,63%	2,63%	0,38%	0,75%	
several times a month [5]	0	1	6	2	2	11
	0,66	4,59	4,14	1,03	0,58	
	0,00%	0,38%	2,26%	0,75%	0,75%	
Total	**16**	**111**	**100**	**25**	**14**	**266**

Chi-square	29,493	● observed number
degrees of freedom	16	● expected number
p-value	0,021	● percent of total

Table 50: Relation between the shopping location "winery" and the price range in which wines are bought. Source: Own survey

Interpretation of the cross table:

Of the people who state that they never buy directly from the winery (57), 23[103] claim that they buy wines in the price range between EUR 6.00 and 9.99, 19[104] between EUR 10.00 and 14.99 and 9 between EUR 2.99 and 5.99. The group of people who buy from the winery once a year, i.e. 115 people, 54 state that they buy wines in the price range between EUR 6.00 and 9.99 and 43[105] between EUR 10.00 and 14.99. 14 people said they bought wines between EUR 15.00 and 19.99. Every other month, 65 people buy directly from the winery. Of these, 26[106] purchase wines in the price range between EUR 6.00 and 9.99, 25 in the price range between EUR 10.00 and 14.99 and 5 each[107] between EUR 15.00 and 19.99 and over EUR 20.00. 18 people state that they buy from the winery once a month. Of these, 7[108], claim to buy wines between EUR 6.00 and 9.99 and between EUR 10.00 and 14.99 each. Of those who state that they shop at the winery several times a month (11), 6 purchase wines between EUR 10.00 and 14.99. However, the expected number of last mentioned parameter and the other price categories is below 5 and can therefore not be considered representative.

[103] expected number 23.79
[104] expected number 21.43
[105] expected number 43.23
[106] expected number 27.12
[107] expected number 6.11 with price range EUR 15.00 to 19.99
[108] expected number 7.51 with price range EUR 6.99 to 9.99

Relation between the shopping location „wine shop" and the price range of the bought wines

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	6,00 - 9,99€ [2]	10,00 - 14,99€ [3]	15,00 - 19,99€ [4]	more than 20,00€ [5]	Total
at a wine shop						
never [1]	14 8,72 5,26%	77 60,51 28,95%	42 54,51 15,79%	10 13,63 3,76%	2 7,63 0,75%	145
once a year [2]	2 5,35 0,75%	27 37,14 10,15%	47 33,46 17,67%	7 8,36 2,63%	6 4,68 2,26%	89
every other month [3]	0 1,26 0,00%	6 8,76 2,26%	7 7,89 2,63%	5 1,97 1,88%	3 1,11 1,13%	21
once a month [4]	0 0,30 0,00%	1 2,09 0,38%	1 1,88 0,38%	1 0,47 0,38%	2 0,26 0,75%	5
several times a month [5]	0 0,36 0,00%	0 2,50 0,00%	3 2,26 1,13%	2 0,56 0,75%	1 0,32 0,38%	6
Total	16	111	100	25	14	266

Chi-square	58,337	● observed number
degrees of freedom	16	● expected number
p-value	0,000	● percent of total

Table 51: Relation between the shopping location "wine shop" and the price range in which wines are bought. Source: Own survey

Interpretation of the cross table:

Of those people who indicate that they never shop at wine shops (145), 77 buy wines in the price range between EUR 6.00 and 9.99 and 42[109] between EUR 10.00 and 14.99. 14 people of this group of buyers purchase wines sold between EUR 2.99 and 9.99. 89 people indicate that they buy wines at wine shops once a year. Of these, 47 people buy wines between EUR 10.00 and 14.99 and 27[110] between EUR 6.00 and 9.99. According to their own statements, 7[111] people in this group buy wines between EUR 15.00 and 19.99. 21 people say they buy wines at wine shops every other month. Of these, 7[112] buy wines between EUR 10.00 and 14.00 and 6 between EUR 6.00 and 9.99. The expected numbers for those who buy at wine shops once or several times a month are comparatively low (below 5) when broken down into the different price categories and can therefore not be regarded as representative.

[109] expected number 54.51
[110] expected number 37.14
[111] expected number 8.36
[112] expected number 7.89

Relation between the shopping location „online" and the price range of the bought wines

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	6,00 - 9,99€ [2]	10,00 - 14,99€ [3]	15,00 - 19,99€ [4]	more than 20,00€ [5]	Total
online						
	15	97	69	16	8	
never [1]	12,38	85,87	76,58	19,34	10,83	**205**
	5,66%	36,60%	26,04%	6,04%	3,02%	
	1	8	21	5	1	
once a year [2]	2,17	15,08	13,45	3,40	1,90	**36**
	0,38%	3,02%	7,92%	1,89%	0,38%	
	0	5	8	2	3	
every other month [3]	1,09	7,54	6,72	1,70	0,95	**18**
	0,00%	1,89%	3,02%	0,75%	1,13%	
	0	1	0	0	1	
once a month [4]	0,12	0,84	0,75	0,19	0,11	**2**
	0,00%	0,38%	0,00%	0,00%	0,38%	
	0	0	1	2	1	
several times a month [5]	0,24	1,68	1,49	0,38	0,21	**4**
	0,00%	0,00%	0,38%	0,75%	0,38%	
Total	**16**	**111**	**99**	**25**	**14**	**265**

Chi-square	40,760	● observed number
degrees of freedom	16	● expected number
p-value	0,001	● percent of total

Table 52: Relation between online shopping and the price range in which wines are bought.
Source: Own survey

Interpretation of the cross table:

Of those people who never buy online, 97 buy wines in the price range between EUR 6.00 and 9.99, 69[113] between EUR 10.00 and 14.99 and 16[114] between EUR 15.00 and 19.99. 36 people state that they buy wines online once a year. Of these, 21 buy wines in the price range from EUR 10.00 to 14.00 and 8[115] people buy wines between EUR 6.00 and 9.99. 18 people buy wines online every other month. Of these, 8 claim to buy wines in the price range between EUR 10.00 and 14.99 and 5[116] buy wines between EUR 6.00 and 9.99. The expected numbers of people who buy wines online once or several times a month are very small (less than 5) and therefore the results cannot be considered representative.

[113] expected number 76.58
[114] expected number 19.34
[115] expected number 15.08
[116] expected number 7.54

Relation between the price range in which most wines are bought and the information-seeking behaviour about wines

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	6,00 - 9,99€ [2]	10,00 - 14,99€ [3]	15,00 - 19,99€ [4]	more than 20,00€ [5]	Total
Do you inform yourself about the wines you consume and if so, how?						
Yes, via awards [1]	2 1,61 0,42%	17 15,95 3,54%	18 16,84 3,75%	2 4,84 0,42%	4 3,76 0,83%	43
Yes, at events [2]	1 2,51 0,21%	19 24,85 3,96%	32 26,24 6,67%	9 7,54 1,88%	6 5,86 1,25%	67
Yes, at fairs [3]	1 1,05 0,21%	5 10,38 1,04%	11 10,97 2,29%	6 3,15 1,25%	5 2,45 1,04%	28
Yes, via magazines [4]	0 1,95 0,00%	17 19,28 3,54%	20 20,37 4,17%	7 5,85 1,46%	8 4,55 1,67%	52
Yes, on the website of the winery/producer/	0 3,04 0,00%	33 30,04 6,88%	34 31,73 7,08%	8 9,11 1,67%	6 7,09 1,25%	81
Yes, through personal advice in the specialised	2 5,03 0,42%	52 49,69 10,83%	52 52,48 10,83%	16 15,08 3,33%	12 11,73 2,50%	134
No [7]	12 2,81 2,50%	35 27,81 7,29%	21 29,38 4,38%	6 8,44 1,25%	1 6,56 0,21%	75
Total	**18**	**178**	**188**	**54**	**42**	**480**

Chi-square	64,322	● observed number
degrees of freedom	24	● expected number
p-value	0,000	● percent of total

Table 53: Relation between the price range in which most wines are bought and the information-seeking behaviour about wines.
Source: Own survey

Interpretation of the cross table:

Of those people who state that they inform themselves about wines through awards (43), 18 buy wines in the price range between EUR 10.00 and 14.99 and 17 between EUR 6.00 and 9.99. 67 people inform themselves about wines at events. Of these, 32 buy wines between EUR 10.00 and 14.99, 19[117] between EUR 6.00 and 9.99 and 9 persons between EUR 15.00 and 19.99. 28 persons inform themselves about the wines they consume at wine fairs. Of these, 11 purchase wines in the price range between EUR 10.00 and 14.99 and 6[118] between EUR 15.00 and 19.99. A further 5[119] purchase wines between EUR 6.00 and 9.99. 52 people state that they obtain information about wines from magazines. Of these, 20[120] buy wines between EUR 10.00 and 14.99 and 17[121] between EUR 6.00 and 9.99. 81 people inform themselves about the wines they consume via the website of the winery or the trade. Of these persons, 34 purchase wines in the

[117] expected number 24.85
[118] As the expected number is below 5, this result may lack representativeness.
[119] expected number 10.38 with wines between EUR 6.00 and 9.99
[120] expected number 20.37
[121] expected number 19.28

price range between EUR 10.00 and 14.99, 33 in the range between EUR 6.00 and 9.99 and 8 in the range between EUR 15.00 and 19.99. The largest group is represented by those persons who state that they obtain information about the wines they consume through personal consultation (134). Of these, 52[122] each state that they buy wines between EUR 6.00 and 9.99 and between EUR 10.00 and 14.99. Another 16 of them say they buy wines between EUR 15.00 and 19.99. 75 people say they are not aware of the wines they consume. Of these, 35 claim to buy wines between EUR 6.00 and 9.99 and 21 buy wines between EUR 10.00 and 14.99.

Relation between the price range in which most wines are bought and the information-seeking behaviour about wineries

	In which price range are most wines you buy?					
	2,99 - 5,99€ [1]	6,00 - 9,99€ [2]	10,00 - 14,99€ [3]	15,00 - 19,99€ [4]	more than 20,00€ [5]	Total
Do you inform yourself about certain winemakers/wineries and if so, via which channels?						
Yes, in (trade) journals [1]	0 2,59 0,00%	18 20,54 4,89%	24 21,61 6,52%	8 6,54 2,17%	6 4,72 1,63%	56
Yes, at events [2]	1 2,68 0,27%	18 21,28 4,89%	23 22,38 6,25%	8 6,78 2,17%	8 4,89 2,17%	58
Yes, at fairs [3]	0 1,25 0,00%	7 9,90 1,90%	9 10,42 2,45%	4 3,15 1,09%	7 2,27 1,90%	27
Yes, online [4]	2 4,80 0,54%	37 38,15 10,05%	41 40,13 11,14%	16 12,15 4,35%	8 8,76 2,17%	104
No [5]	14 5,68 3,80%	55 45,12 14,95%	45 47,46 12,23%	7 14,37 1,90%	2 10,36 0,54%	123
Total	17	135	142	43	31	368

Chi-square	47,927	● observed number
degrees of freedom	16	● expected number
p-value	0,000	● percent of total

Table 54: Relation between the price range in which most wines are bought and the information-seeking behaviour about wineries.
Source: Own survey

Interpretation of the cross table:

Of those who inform themselves about winegrowers and wineries in journals (56), 24 state that they buy wines between EUR 10.00 and 14.99, 18[123] purchase wines between EUR 6.00 and 9.99 and 8 between EUR 15.00 and 19.99. 58 people inform themselves about wineries at events. Of these, 23 purchase wines in the price range between EUR 10.00 and 14.99, 18[124] between EUR 6.00 and 9.99 and 8 between EUR 15.00 and 19.99. 27 people inform themselves

[122] expected number 52.48 with wines between EUR 10.00 and 14.99
[123] expected number 20.54
[124] expected number 21.28

about wineries at trade fairs. Of these persons, 9[125] claim to purchase wines between EUR 10.00 and 14.99, and 7 between EUR 6.00 and 9.99. 104 persons state that they obtain information about wineries online. Of these persons, 41 purchase wines between EUR 10.00 and 14.99, 37[126] between EUR 6.00 and 9.99 and 16 between EUR 15.00 and 19.99. The largest group with 123 mentions states that they do not inform themselves about wineries. Of these people, 55 buy wines between EUR 6.00 and 9.99, 45[127] between EUR 10.00 and 14.99, and 14 between EUR 2.99 and 5.99.

Relation between the shopping location "supermarket" and the factors which are decisive for tasting wines

Which factors are decisive for you to taste wines?	never [1]	once a year [2]	Supermarket every other month [3]	once a month [4]	several times a month [5]	Total
price [1]	10 17,67 1,32%	29 30,33 3,83%	30 24,19 3,96%	17 15,42 2,24%	9 7,39 1,19%	95
special occasion [2]	31 27,34 4,09%	56 46,93 7,39%	35 37,43 4,62%	16 23,85 2,11%	9 11,44 1,19%	147
events (e.g. Open cellar door/trade fairs/wine dinners/tastings) [3]	29 24,55 3,83%	41 42,14 5,41%	34 33,61 4,49%	19 21,42 2,51%	9 10,27 1,19%	132
advertsing in shops [4]	1 2,98 0,13%	4 5,11 0,53%	1 4,07 0,13%	7 2,60 0,92%	3 1,25 0,40%	16
advertising in restaurants (e.g. table displays) [5]	6 5,21 0,79%	8 8,94 1,06%	5 7,13 0,66%	6 4,54 0,79%	3 2,18 0,40%	28
advertising in magazines/journals [6]	3 4,84 0,40%	9 8,30 1,19%	8 6,62 1,06%	4 4,22 0,53%	2 2,02 0,26%	26
online advertising [7]	4 2,42 0,53%	2 4,15 0,26%	3 3,31 0,40%	3 2,11 0,40%	1 1,01 0,13%	13
advertising in leaflets [8]	0 2,42 0,00%	3 4,15 0,40%	1 3,31 0,13%	5 2,11 0,66%	4 1,01 0,53%	13
TV advertising [9]	0 0,19 0,00%	0 0,32 0,00%	0 0,25 0,00%	0 0,16 0,00%	1 0,08 0,13%	1
recommendations from friends/colleagues/service personnel [10]	44 38,13 5,80%	64 65,45 8,44%	53 52,20 6,99%	30 33,27 3,96%	14 15,96 1,85%	205
packaging/label [11]	13 15,25 1,72%	26 26,18 3,43%	23 20,88 3,03%	16 13,31 2,11%	4 6,38 0,53%	82
Total	**141**	**242**	**193**	**123**	**59**	**758**

Chi-square	63,601	● Observed number
Degrees of freedom	40	● Expected number
p-value	0,010	● Percent of total

Table 55: Relation between wine purchases at the supermarket and decisive factors for tasting wines. Source: Own survey

Interpretation of the cross table:

Among those persons who state that they never buy wines at the supermarket (141), the group of those for whom the factor recommendation from friends/colleagues/service personnel is decisive is the most pronounced (44), followed by special occasions (31) and events (29).

125 expected number 10.42
126 expected number 38.15
127 expected number 47.46

Among those who state that they buy wines at the supermarket once a year (242), recommendation also plays the most important role (64) but is slightly below the expected number of 65.45. Second and third places are occupied by special occasions (56) and events (41). Recommendations also take first place for supermarket purchases made every other month (53 mentions), followed by special occasions (35) and events (34). Among the group of people who state that they buy wine at the supermarket every month, recommendations were also identified as the most important factor influencing the tasting of wines (30, but below the expected number of 33.27), followed by events (19), price (17) and special occasions and packaging/labelling (16 each). Among persons who buy wines at the supermarket several times a month, recommendations were identified to be the most important of the factors (14) that determine the tasting of wines, followed by the price (9), special occasions (9)[128] and events (9)[129].

[128] expected number 11.44
[129] expected number 10.17

Relation between the shopping location "discounter" and the factors which are decisive for tasting wines

	Discounter: never [1]	once a year [2]	every other month [3]	once a month [4]	several times a month [5]	Total
Which factors are decisive for you to taste wines?						
price [1]	48	26	11	7	3	
	58,53	19,93	10,28	5,26	1,00	**95**
	6,33%	3,43%	1,45%	0,92%	0,40%	
special occasion [2]	101	28	11	6	1	
	90,57	30,84	15,90	8,15	1,55	**147**
	13,32%	3,69%	1,45%	0,79%	0,13%	
events (e.g. Open cellar door/trade fairs/wine	86	26	13	6	1	
	81,32	27,69	14,28	7,31	1,39	**132**
	11,35%	3,43%	1,72%	0,79%	0,13%	
advertsing in shops [4]	4	2	6	4	0	
	9,86	3,36	1,73	0,89	0,17	**16**
	0,53%	0,26%	0,79%	0,53%	0,00%	
advertising in restaurants (e.g. table displays) [5]	15	7	5	1	0	
	17,25	5,87	3,03	1,55	0,30	**28**
	1,98%	0,92%	0,66%	0,13%	0,00%	
advertising in magazines/journal s [6]	15	6	3	2	0	
	16,02	5,45	2,81	1,44	0,27	**26**
	1,98%	0,79%	0,40%	0,26%	0,00%	
online advertising [7]	10	1	2	0	0	
	8,01	2,73	1,41	0,72	0,14	**13**
	1,32%	0,13%	0,26%	0,00%	0,00%	
advertising in leaflets [8]	5	4	1	2	1	
	8,01	2,73	1,41	0,72	0,14	**13**
	0,66%	0,53%	0,13%	0,26%	0,13%	
TV advertising [9]	0	1	0	0	0	
	0,62	0,21	0,11	0,06	0,01	**1**
	0,00%	0,13%	0,00%	0,00%	0,00%	
recommendations from friends/colleague	135	41	20	8	1	
	126,30	43,00	22,18	11,36	2,16	**205**
	17,81%	5,41%	2,64%	1,06%	0,13%	
packaging/label [11]	48	17	10	6	1	
	50,52	17,20	8,87	4,54	0,87	**82**
	6,33%	2,24%	1,32%	0,79%	0,13%	
Total	**467**	**159**	**82**	**42**	**8**	**758**

Chi-square	60,774	● Observed number
Degrees of freedom	40	● Expected number
p-value	0,019	● Percent of total

Table 56: Relation between wine purchases at the discounter and the decisive factors for tasting wines. Source: Own survey

Interpretation of the cross table:

Among those people who state that they never buy wines at discount stores, 135 people indicate that recommendations from friends/colleagues/service personnel are a decisive factor for tasting wines, followed by special occasions (101) and events (86). Respondents who state that they buy at a discount store once a year also claim that recommendations are a decisive factor for tasting wines (41)[130], followed by special occasions (28)[131], price (26) and events (26)[132]. 82 people buy wines at the discount store every other month. Of these, 20[133] indicate that recommendations are a determining factor for wine tasting, followed by events (13)[134], price

130 expected number 43
131 expected number 30.43
132 expected number 27.69
133 expected number 22.18
134 expected number 14.28

and special occasions (11)[135]. Among people who buy wines at the discount store once a month (42), 8[136] indicate that recommendations are a determining factor for wine tasting, 7 state the price and 6 each mention special occasions[137]and events[138]. The expected number of respondents who state to buy at discounters several times a month and for who the following factors are decisive for tasting wines: price, special occasion, events, advertising in shops, restaurants, magazines, online, in leaflets, on TV, recommendations from friends/colleagues, and packaging/label, is below 5 and therefore, results may not be representative. This also applies for the expected number of people who state to shop at a discounter once a year and for who the following factors are decisive for tasting wines: advertising in shops, online, in leaflets and on TV.

In addition, the expected number of those test persons, who buy their wines at discount stores every other month and for who the following factors are decisive for tasting wines: advertising in shops, in restaurants, in magazines, online, in leaflets and on TV, is below 5 and may therefore lack of representativeness. The same applies for the group of people who buy there once a month and who state to be influenced by advertising in shops, restaurants, magazines, online, in leaflets, on TV and the packaging or label.

[135] expected number 15.90
[136] expected number 11.36
[137] expected number 8.15
[138] expected number 7.31

Relation between the countries of origin from which the respondents buy wines and the shopping location "specialised wine trade"

	From which countries do you buy wine?						
	France [1]	Italy [2]	New World (USA, South America, Canada, Australia, New Zealand, South Africa) [3]	Austria [4]	Spain [5]	Other – if other: which? [6]	Total
Specialised wine trade (e.g. Wein & Co, Ammersin, etc.)							
never [1]	20	32	8	111	14	6	191
	21,48	38,27	15,11	87,61	20,14	8,39	
	3,51%	5,62%	1,41%	19,51%	2,46%	1,05%	
once a year [2]	21	48	23	98	21	7	218
	24,52	43,68	17,24	100,00	22,99	9,58	
	3,69%	8,44%	4,04%	17,22%	3,69%	1,23%	
evey other month [3]	15	23	9	38	17	8	110
	12,37	22,04	8,70	50,46	11,60	4,83	
	2,64%	4,04%	1,58%	6,68%	2,99%	1,41%	
once a month[4]	6	5	3	7	3	2	26
	2,92	5,21	2,06	11,93	2,74	1,14	
	1,05%	0,88%	0,53%	1,23%	0,53%	0,35%	
several times a month [5]	2	6	2	7	5	2	24
	2,70	4,81	1,90	11,01	2,53	1,05	
	0,35%	1,05%	0,35%	1,23%	0,88%	0,35%	
Total	64	114	45	261	60	25	569

Chi-square	36,885	● observed number
degrees of freedom	20	● expected number
p-value	0,012	● percent of total

Table 57: Relation between the countries of origin from which the respondents buy wines and the shopping location "specialised wine trade".
Source: Own survey

Interpretation of the cross table:

Of those respondents who state that they never buy from the specialised wine trade, 111 say they buy wines from Austria. 32[139] buy wines from Italy and 20[140] from France. 218 people claim to buy in the specialised wine trade once a year. Of these, 98[141] buy wines from Austria, 48 from Italy and 23 from the New World. 110 people shop in the specialised wine trade every other month. Of these, 38 claim to buy wines from Austria, 23 from Italy and 17 from Spain. 26 people state that they buy from specialised wine trade once a month. Of these, 7[142] purchase wines from Austria, 6 from France and 5[143] from Italy. 24 respondents buy from the specialised wine trade several times a month. Of these, 7[144] buy wines from Austria, 6 from Italy and 5 from Spain. However, as the expected number of the two last-mentioned countries are below 5, these results may lack representativeness.

[139] expected number 38.27
[140] expected number 21.48
[141] expected number 100.00
[142] expected number 11.93
[143] expected number 5.21
[144] expected number 11.01

Relation between the countries of origin from which the respondents buy wines and the shopping location "wine shop"

	From which countries do you buy wine?						
	France [1]	Italy [2]	New World (USA, South America, Canada, Australia, New Zealand, South Africa) [3]	Austria [4]	Spain [5]	Other – if other: which? [6]	Total
at a wine shop							
never [1]	26 29,02 4,57%	48 51,69 8,44%	11 20,40 1,93%	141 118,34 24,78%	27 27,21 4,75%	5 11,34 0,88%	258
once a year [2]	24 22,50 4,22%	42 40,07 7,38%	20 15,82 3,51%	88 91,74 15,47%	19 21,09 3,34%	7 8,79 1,23%	200
evey other month [3]	12 8,66 2,11%	16 15,43 2,81%	11 6,09 1,93%	21 35,32 3,69%	10 8,12 1,76%	7 3,38 1,23%	77
once a month[4]	1 1,46 0,18%	3 2,60 0,53%	1 1,03 0,18%	5 5,96 0,88%	0 1,37 0,00%	3 0,57 0,53%	13
several times a month [5]	1 2,36 0,18%	5 4,21 0,88%	2 1,66 0,35%	6 9,63 1,05%	4 2,21 0,70%	3 0,92 0,53%	21
Total	64	114	45	261	60	25	569

Chi-square	50,743	● observed number
degrees of freedom	20	● expected number
p-value	0,000	● percent of total

Table 58: Relation between the countries of origin from which the respondents buy wines and the shopping location "wine shop".
Source: Own survey

Interpretation of the cross table:

Of those who never shop at a wine shop (258), 141 state that they buy wines from Austria, 48[145] buy wines from Italy and 27[146] from Spain. 200 people shop at a wine shop once a year, including 88[147] who buy wines from Austria, 42 from Italy and 24 from France. 77 people shop at a wine shop every other month. 21[148] of them buy wines from Austria, 16 from Italy and 12 from France. 13 people shop at a wine shop once a month. Of these, 5[149] people buy wines from Austria. The expected number of people who buy wines at a wine shop once a month and who buy wines from France, Italy, the New World, Spain and other is comparatively low (below 5). For this reason, these results may lack representativeness. 21 people shop at the Wine Shop several times a month and of these, 6[150] buy wines from Austria. The expected number of people who buy wines at a wine shop several times a month and who buy wines from France, Italy, the

[145] expected number 51.69
[146] expected number 27.21
[147] expected number 91.74
[148] expected number 35.32
[149] expected number 5.96
[150] expected number 9.63

New World, Spain and other is comparatively low (below 5). For this reason, these results may lack representativeness.

Relation between the countries of origin from which the respondents buy wines and the shopping location "online"

online	France [1]	Italy [2]	New World (USA, South America, Canada, Australia, New Zealand, South Africa) [3]	Austria [4]	Spain [5]	Other – if other: which? [6]	Total
	From which countries do you buy wine?						
never [1]	38 42,56 6,74%	78 76,34 13,83%	21 29,72 3,72%	200 175,64 35,46%	31 40,53 5,50%	13 16,21 2,30%	381
once a year [2]	15 11,95 2,66%	19 21,44 3,37%	17 8,35 3,01%	36 49,33 6,38%	15 11,38 2,66%	5 4,55 0,89%	107
evey other month [3]	7 5,70 1,24%	11 10,22 1,95%	3 3,98 0,53%	18 23,51 3,19%	9 5,43 1,60%	3 2,17 0,53%	51
once a month[4]	2 0,78 0,35%	1 1,40 0,18%	1 0,55 0,18%	2 3,23 0,35%	1 0,74 0,18%	0 0,30 0,00%	7
several times a month [5]	1 2,01 0,18%	4 3,61 0,71%	2 1,40 0,35%	4 8,30 0,71%	4 1,91 0,71%	3 0,77 0,53%	18
Total	63	113	44	260	60	24	564

Chi-square	43,780	● observed number
degrees of freedom	20	● expected number
p-value	0,002	● percent of total

Table 59: Relation between the countries of origin from which the respondents buy wines and online shopping. Source: Own survey

Interpretation of the cross table:

381 people state that they never buy wines online. Among these, 200 people generally buy wines from Austria, 78 from Italy and 38[151] from France. 107 people say they buy wines online once a year. Of these, 36[152] buy wines from Austria, 19[153] from Italy and 17 from the New World. Among those people who buy wines online every other month (51), 18[154] buy wines from Austria, 11 from Italy and 9 from Spain. The expected number of people who buy wines online once or several times a month and who buy wines from France, Italy, the New World, (in case of once a month) Austria, Spain and other is comparatively low (below 5). For this reason, these results may lack representativeness.

[151] expected number 42.56
[152] expected number 49.33
[153] expected number 21.44
[154] expected number 23.51

Relation between the countries, from which wines are bought and the information-seeking behaviour about wineries

	From which countries do you buy wine?						
	France [1]	Italy [2]	New World (USA, South America, Canada, Australia, New Zealand, South Africa) [3]	Austria [4]	Spain [5]	Other - if other: which? [6]	Total
Do you inform yourself about certain winemakers/wineries and if so, via which channels?							
Yes, in (trade) journals [1]	21	34	16	56	22	13	162
	19,50	32,79	15,95	64,34	19,14	10,28	
	2,30%	3,72%	1,75%	6,13%	2,41%	1,42%	
Yes, at event [2]	22	38	20	58	20	11	169
	20,34	34,21	16,64	67,12	19,97	10,72	
	2,41%	4,16%	2,19%	6,35%	2,19%	1,20%	
Yes, at fairs [3]	13	19	13	27	14	10	96
	11,55	19,43	9,45	38,13	11,34	6,09	
	1,42%	2,08%	1,42%	2,95%	1,53%	1,09%	
Yes, online [4]	34	56	33	103	37	19	282
	33,94	57,08	27,77	112,00	33,32	17,89	
	3,72%	6,13%	3,61%	11,27%	4,05%	2,08%	
No [5]	20	38	8	119	15	5	205
	24,67	41,49	20,19	81,42	24,22	13,01	
	2,19%	4,16%	0,88%	13,02%	1,64%	0,55%	
Total	110	185	90	363	108	58	914

Chi-square	49,296	● observed number
degree of freedom	20	● expected number
p-value	0,000	● percent of total

Table 60: Relation between the countries, from which wines are bought and the information-seeking behaviour about wineries. Source: Own survey

Interpretation of the cross table:

Of those who state that they inform themselves about wineries in journals (162), 56[155] buy wines from Austria, 34 from Italy and 22 from Spain. 169 people inform themselves about wineries at events. Of these, 58[156] buy wines from Austria, 38 from Italy and 22 from France. Of those 96 people who stated that they inform themselves about wines at trade fairs, 27[157] buy wines from Austria, 19[158] from Italy and 14 from Spain. The largest group (282 people) say they find out about wineries online. Of these, the largest group (103[159]) also declares that they buy wines from Austria, 56[160] people buy wines from Italy and 37 from Spain. 205 people state that they do not inform themselves about wineries. Of them, 119 buy wines from Austria, 38[161] from Italy and 20[162] from France.

155 expected number 64.34
156 expected number 67.12
157 expected number 38.13
158 expected number 19.43
159 expected number 112
160 expected number 57.08
161 expected number 41.49
162 expected number 24.67

Relation between the age of the respondents and the shopping location "at the winery"

	You are...					
at a winery	between 16 and 20 years old [1]	between 21 and 29 years old [2]	between 30 and 45 years old [3]	between 46 and 60 years old [4]	over 60 years old [5]	Total
	2	23	18	8	6	
never [1]	1,07	12,86	17,36	14,36	11,36	57
	0,75%	8,65%	6,77%	3,01%	2,26%	
	1	23	39	30	22	
once a year [2]	2,16	25,94	35,02	28,97	22,91	115
	0,38%	8,65%	14,66%	11,28%	8,27%	
	0	10	17	22	16	
every other month [3]	1,22	14,66	19,79	16,37	12,95	65
	0,00%	3,76%	6,39%	8,27%	6,02%	
	2	3	5	4	4	
once a month [4]	0,34	4,06	5,48	4,53	3,59	18
	0,75%	1,13%	1,88%	1,50%	1,50%	
	0	1	2	3	5	
several times a month [5]	0,21	2,48	3,35	2,77	2,19	11
	0,00%	0,38%	0,75%	1,13%	1,88%	
Total	5	60	81	67	53	266

Chi-square	35,248	● observed number
degrees of freedom	16	● expected number
p-value	0,004	● percent of total

Table 61: Relation between the age of the respondents and the shopping location "at the winery". Source: Own survey

Interpretation of the cross table:

Among those who say they never shop at the winery, 23 are between 21 and 29, 18 between 30 and 45 and 8[163] between 46 and 60 years old. Among those who say they shop at the winery once a year (115), 39 are between 30 and 45 years old, 30 between 46 and 60 and 23[164] between 21 and 29. 65 say they shop at the winery every other month. Among those, 22 are between 46 and 60 years old, 17[165] between 30 and 45 and 16 over 60. 18 people shop at the winery once a month. Of these, 5[166] are between 30 and 45 years old and 4 each[167] between 46 and 60 and over 60 (however, the expected number of the last two mentions is below 5 and therefore, results may not be representative). 11 people shop at the winery several times a month. The expected number of people who buy wines at a winery several times a month and who are between 16 and 20 years, 21 and 29, 30 and 45, 46 and 60 and over 60 years old is comparatively low (below 5). For this reason, these results may lack representativeness.

[163] expected number 14.36
[164] expected number 25.94
[165] expected number 19.79
[166] expected number 5.48
[167] expected number 4.53 with age group between 30 and 45 years

Appendix B

As announced in chapter 7, the entire communication model is presented in detail below.

STEP 1 – Evaluation of the status quo of the winery

In the first step, the parameters “business figures”, “products”, “price”, “distribution channels”, “customer structure”, “communication and promotion”, “personnel”, “processes”, “physical evidence” and last but not least “philosophical orientation and vision” are to be analysed using data from the winery.

The collection of these data is of great importance, as improvements and corrections can only be made if the status quo is known in full. Due to many years of experience in this economic sector and on the basis of the expert interviews carried out, it was found that many companies work without medium and / or long-term planning, especially in the areas of customer structure and communication. In addition, major deficits were identified in the area of communicating one's own philosophy.

By working on the following areas, deficits in precisely these fields are to be eliminated and opportunities are to be pointed out.

1. Evaluation of the business figures

The first step is to collect relevant company data. This is important to determine the economic status quo. Only when these data are known is it possible to make informed decisions for change.

The following figures should be noted:

- Turnover of the last five years
- Sales volume of the last five years
- Profit/loss of the last five years
- Production volume of the last five years

2. Evaluation of the current situation of all products

In this step, the questions below should be answered in order to obtain a basis for the evaluation of the own products.

The aim of this analysis is to determine which products were sold in which quantities and which production costs are attributable to the individual products, so that decisions about possible changes in the product range can be made in a further step.

The questions to deal with are:

- Which products are represented in the current range?
- Which products are sold in which quantities?
- What are the production costs of each product?

3. Evaluation of the current pricing policy

In the following, all products will be considered in the context of the pricing policy. All prices will be evaluated, and the corresponding margins will be set in relation to production costs.

The aim of this evaluation is to find out whether prices can be optimised. For this purpose, the questions below shall be answered:

- At what prices are the individual products sold?
- What is the margin of each product?

In the next step, information on the current pricing policy will be provided.
The following questions should be answered:

- In which price range are the products of the winery compared to the competitors? Are they high, low or average-priced compared to the competitors?
- Are there fixed promotions?
- Are there (seasonal) fluctuations and promotions?
- Is the pricing strategy discussed with distribution partners?

4. Evaluation of the current distribution situation

The aim of this analysis is to list all distribution channels and also the respective shares of sales in these channels in order to carry out optimisations in a next step if necessary.

- Where are the products sold (sales channels)?
- What is the proportion of the various channels?
- Which foreign markets are served? Which products are exported and at what prices?

5. Evaluation of the current customer structure

The aim of this analysis is to get an overview of all customers in order to strive for optimisation where necessary. It is recommended that the analysis is carried out for both end customers and B2B customers. This analysis is particularly important to find out whether the current customer segments are fit for the future.

- What is the structure of the existing end customers and resellers and what share do the respective segments have?

Recommendations for classifying customer segments can be found in the work sheet in appendix C.

6. Evaluation of the marketing communication activities

In this step all marketing communication measures of the company should be evaluated. To do this, it is essential to look at all the areas listed below and describe them in as much detail as possible.

The aim of this analysis is not only to ascertain the status quo of this area of the company but also to identify deficiencies that can be remedied in a further step. Without a detailed analysis in this area, it will not be possible to take coordinated action to exploit the full potential.

First of all, the persons responsible for communication should be named. In addition, all materials currently available for marketing communication purposes should also be listed.

- Who communicates?
- What materials are available for communication purposes and what are the costs of the individual materials?

Subsequently, the winery's communication is illuminated. The following questions will be helpful in this respect:

- Which information is communicated?
- How is communicated (individual / mass communication)?
- Which channels are used for communication?

Communication channels already in use are now being evaluated. Further input for the evaluation can be found in the work sheet in appendix C.

- Website
    - Structure of the website and mobile optimisation / optimisation for all devices
    - Quality of information transported
    - Who is responsible for managing the website?

- Social Media
    - Which social media channels are served?
    - How often are these channels served and which content is published there?
    - Who is responsible for managing the channels?

- Newsletter:
    - How many subscribers are there currently?
    - How often is the newsletter sent?
    - What is communicated?
    - Who is responsible for the newsletter?

- Press work (Editorial coverage in newspapers, journals or websites)
    - How often are journalists and media provided with relevant information and professional pictures?
    - Who is responsible for this?

- Advertising
    - How many advertisements have been placed in the last three years?
    - Which media was used for advertising?
    - What exactly was advertised?
    - Which costs occurred?
    - What was the result?

- Events
    - In which events has the company participated in the last three years?
    - Which events has the company organised itself in the last three years?
    - What costs have been incurred for the participation in events?
    - What was the result?

- Fairs
    - B2C: In which end customer fairs has the company participated in the last three years?
    - B2B: In which B2B trade fairs has the company participated in the last three years?
    - What costs were incurred for the participation in fairs?
    - What was the result?

- Awards and ratings
    - In which awards does the winery participate? Which products are rated?
    - What costs have been incurred for the participation in awards?
    - What was the result?

7. Evaluation of the acting people

In this step all persons acting on behalf of the winery, both family members and employees, should be discussed.

The aim of this analysis is to determine the status quo of this business unit as well as the potential for optimisation. Therefore, the following questions should be found answers to:

- Who is/are the face(s) of the company and what values do(es) he/she/they transport?

- What is the share of purchased personnel services?
- What are the personnel costs? What is the number of hours of persons who are employed and also those who work for your company free of charge (allocated at an average hourly rate)?

8. Evaluation of the processes

In this step, all the processes that take place every day at the winery should be dealt with.

The aim of this analysis is to determine the status quo of these processes and to identify potential for optimisation.

- How is the regular course of events in the company in terms of:
  - purchases
  - orders
  - communication
- How often are processes changed/questioned?

9. Evaluation of the physical evidence

In this step the physical evidence and the equipment of the winery shall be evaluated.

The aim of this analysis is to determine whether facilities and necessary equipment is available and if not, where it is needed.

- Does the company fulfil characteristics such as easy accessibility, parking spaces or washrooms?

Further input can be found in the work sheet in appendix C.

10. Evaluation of the basic philosophical orientation and vision

In addition to the analysis of company figures, products, prices, distribution channels, customer structure, communication measures, personnel, processes and equipment, it is essential to evaluate the philosophical orientation of the company.

The aim of this analysis is to determine what the company stands for and what values are transported in order to sharpen these values and communicate them more precisely.

Questions that help become clear about the philosophical orientation are:

- What does the company stand for / which values are important?
- What is unique about the winery?
- What is the company proud of? What is it particularly good at?
- Which products stand out?

STEP 2 – Definition and formulation of objectives

The second step is to discuss questions and suggestions regarding the definition of objectives.

Again, the respective areas presented above will be worked on, but this time with regard to future objectives. It is necessary to go through the areas step by step and also in case some areas do not need improvement, this shall be noted.

Further questions and remarks to all discussed areas that help becoming clear of the objectives will be found in the work sheet in appendix C. At this point it should be mentioned that the objectives listed in the work sheet only serve as an orientation and that the individual objectives of the companies should be placed here.

This step is essential because without precise targets, it is impossible to measure the achievement of objectives. In addition, it has been proven that set goals spur people to follow a defined path in order to reach what they long for.

1. Objectives in the area of business figures

In this step, all the winery's financial objectives, such as the intention to make more profit (quantified by how much), should be listed. Answers to the following question shall be given in as much detail as possible:

- What are the financial goals of the winery?

2. Objectives in the area of products

Now all goals related to the product area should be written down. The following questions will help to formulate objectives:

- Should products be removed from the range? Which and why?
- Should new products be added to the range? Which and why?

3. Objectives in the area of pricing

In the following all objectives in the area of pricing shall be mentioned. The following questions can provide assistance in formulating objectives:

- Shall products be sold at a higher price? If yes, which products in particular and by how much?
- Shall promotions be carried out? If yes, which?

4. Objectives in the area of distribution

The next step is to describe all targets in terms of distribution and sales channels. Questions for this field could be:

- Should be sold in other/further channels? If yes, which products?

5. Objectives in the area of customers

Subsequently, all targets in the area of customers shall be presented. Relevant questions could be:

- Is there the need/wish to expand the existing group of customers?
- Are the existing customers fit for the future or is there a risk that customers will break away?

6. Objectives in the area of marketing communication

Objectives should also be noted in the area of the winery's marketing communication policy. Sample questions are:

- Should press coverage be increased?
- Should the awareness of the winery be enhanced?

7. Objectives in the personnel area

The next step deals with the goals in the personnel area. These questions could be helpful:

- Do existing employees need any form of training?
- Are all employees deployed in the right area?

8. Objectives in the area of processes

Targets in the area of processes should be given space here. Questions to deal with are among others:

- Should orders be processed faster by a certain percentage?

9. Objectives in the area of physical evidence

In this step, objectives in the field of physical evidence will be identified. A potential question to discuss could be:

- Should new equipment be installed?

10. Objectives in the area of the philosophy of the business

All objectives that are related to the philosophy of the house should be mentioned here. A thought to which attention should be paid is:

- Should other or further values be generated?

11. Further objectives

It is essential to define and record all objectives across all business units. However, in addition, any further objectives of the winery, that do not fit into the categories mentioned earlier, should also be described in as much detail as possible.

STEP 3 – Implementation of the defined measures in order to achieve the set objectives

The third step is the conversion from the initial state to the desired state. Possible changes to the current situation in relation to the defined objectives have to be implemented.

This step is a guide to what action should be taken and what considerations should be made in order to achieve the objectives defined in step 2.

The work sheet will offer comprehensive input.

1. Steps to success in the area of products

In this step, the optimised and new product range should be described. Therefore, the following questions should be answered (further input is found in the work sheet in appendix C):

- Which products can/should be dispensed with (slow sellers)? See step 1.
- Can/should new products be introduced?
- Do the products meet the taste of the markets the winery wants to be present in?

Tip: Information about the desired markets/target groups should be gathered in advance, e.g. via Chambers of Commerce, official agancies, etc.

The output will be optimised products – manufactured at optimised costs – tailored to the desired target groups possibly taking trends into account.

2. Steps to success in the area of price

The next step is to describe the optimised product prices and pricing strategy.

Tip: The surveyed target group buys wines between EUR 6.00 and 14.99!

Therefore, the following answers shall be answered (additional input is found in the work sheet in appendix C):

- Can sales prices be optimised?
- Can the pricing strategy be optimised?

Tip: The pricing strategy should be defined in consultation with trade partners and the targeted and programmed use of promotions and sales-promoting activities is advisable!

↓

The output of this part will be an optimised pricing strategy and optimal sales prices.

3. Steps to success in distribution channels

In this step, the desired changes in the area of distribution channels are to be implemented. Therefore, it is essential to answer the following questions:

- Are there channels, in which more/less wine should be sold?
- Should less/more/other markets be served?

The result of the evaluation of this business unit will be an optimised distribution of sales channels.

4. Steps to success in customer segments

The following step once again devotes its attention to existing and future customers.

Tip 1: A good mix of farm-gate sales or sales to end customers, sales to the catering trade, to resellers and – if desired – also to partners abroad is recommended in order to minimize the risk of default.
Tip 2: Ensure that new and young customers are constantly attracted to the winery.
Tip 3: The special features of the business should definitely be taken into account. If, for example, the winery is located in a wine-tourist area and can sell a large part of its production from the farm, this is more recommendable from a price point of view than relying on many different sales channels.

The answer to the following questions will help create optimised customer segments.

- Are the customer segments fit for the future? Could parts of the segments break away in the next few years? *See Step 1.*

The output will be an optimised customer structure for the winery.

5. Steps to success in marketing communication

The following step is dedicated to the optimised measures in the areas of the winery's marketing communication policy.

Since this area is the focus of the present research study, most space is given to it in order to really take all aspects into account. Therefore, the scope of the recommendations is correspondingly large.

By answering the following questions, optimised conditions for the field of communication can be established. Detailed remarks will be found in the work sheet in appendix C.

- Is it possible to optimise the communication methods of the person(s) in charge?

> Tip: All persons who communicate on behalf of the winery must be able to convey the philosophy of the company in all areas.

- Can existing marketing communication materials be optimised?

> Tip: All materials should be up-to-date, attractively designed, tailored to the target group and in the winery's corporate design.

- Can costs related to marketing communication materials be optimised?

- Can more or other information be communicated?

Tip 1: Information that should generally be disseminated: new products, great reviews, events, participation in trade fairs, promotions, new sales partners, general news, etc. Tip 2: Above all, the communication of the company's USPs is recommended in the form of stories. If there are difficulties in this area, the assistance of experts is highly recommended. Tip 3: An elaborated media plan is essential and should answer to these questions: Which information is published, to what extent, where and when?

- Can additional communication channels be used? See Step 1.

Tip 1: Individual communication and its channels: **Directly at the winery in the context of sales**: All persons in charge of sales should be able to pass on the philosophy of the company and the corporate identity to the customer. It is recommended to use the fact that the customer is on site in the company for customer retention purposes. A satisfied customer is inclined to pass on positive experiences and thus becomes an ambassador of the winery. **At B2C trade fairs with end consumers**: Optimal preparation through appropriate presentation of products intended for the target group of end consumers is required. **At B2B trade fairs with resellers** (retailers, importers, wine shops, restaurateurs): Optimal preparation is a must, as is the contacting of all contacts made at the trade fair afterwards. **At events**: The local customer group must be served according to their specific needs in order to generate an experience. **By e-mail**: Prompt response to all e-mail enquiries is required. **By telephone**: Competent and customer-friendly information is a must. **By social media**: Communication by responding to comments or requests in chats is necessary.

Tip 2: Mass Communication and its channels:

Website: A mobile optimised, well-structured website, which provides all information about the winery in an easily accessible way is a must for every winery. All information must be up to date (vintages, event announcements etc.).

Social media: The use of social media instruments is highly recommended depending on the desired target group. Customers should be picked up where they are. Therefore, it is advisable to find out about the customer structure of the desired media (Facebook: 62% of Facebook users worldwide are under 35 years of age; 74% have a high income; 64% of all people prefer to use messaging rather than a phone call to contact a company; the age group 65+ is the fastest growing user group on Facebook (Hubspot, 2020); Instagram: 71% of Instagram users worldwide are under 35 years of age; 1.90% are over 65 (Statista, 2020f)). Since developments in the social media sector are very fast, it is advisable to obtain up-to-date key data before implementing new social media channels.

It is also important in the social media area to create an editorial plan with time and content planning: What is published and when? The use of these free media is recommended if continuous personal and professional support can be guaranteed. As with the website, the topicality of the data is top priority and an awareness of the fast pace of this medium must be created.

Impersonalized newsletters: It is recommended to regularly inform customers who have agreed to receive the newsletter. This channel can be used for information about products, events or general information.

Classical advertising (offline): Editorial contributions through targeted media work (editors should be provided with press releases and professional pictures) are desirable. Paid advertisements must be professionally designed and should only be placed if the media budget is adequate and the products are available nationwide, ideally together with a sales partner.

Online advertising: A distinction can be made between the use of "classic" advertising media such as advertisements – in the form of banners or online advertorials on websites – and social media advertising. Since both forms of advertising have the advantages of targeting, the targeted approach to the desired customer group, scatter loss can be kept to a minimum. The recommendation is to use social media advertising, as the advertising budget needed is comparatively small and yet a large number of interested parties can be reached.

Tip 3: Inform journalists regularly about news and specials!

- Events

> Tip: Participation in events and, if resource-wise possible, also organising events yourself is highly recommended as customer loyalty tools and should be applied.

  - Can the participation in events be optimised?
  - Which events "must" the company participate in? Where is participation not necessary / suitable for the company?

- Trade fairs

> Tip 1: When participating in a trade fair, all the winery's information channels should be made fit for the trade fair, which means that information such as where the winery's stand is located in the exhibition hall must also be made public on its own channels.
> Tip 2: Trade fairs are suitable places to test products and to observe the market.

  - B2C: How can participation be optimised to achieve greater success? Should the winery continue to participate in fair(s) they have participated?

> Tip: Offers for end consumers must be prepared and presented on site.

  - B2B: How can participation be optimised to ensure greater success? Should the winery continue to participate in fair(s) they have participated?

> Tip: Participation in B2B trade fairs is recommended with extensive preparation and follow-up work in the event that retail and/or catering customers are to be acquired or served.

- Awards and ratings

Tip: Find out which ratings are important in the desired target groups and countries.

  - Are there any awards/ratings that go better with the products? Should other products be rated?

The elaborated and combined output of this section will present optimised communication and advertising measures.

6. Steps to success in the personnel sector

As can be seen from both qualitative and quantitative research, the human factor plays a major role and has a decisive influence on the economic success of a company. For this reason, this step is dedicated to optimised conditions in the personnel area.

Tip 1: The face(s) of the business, be it the owner(s) or a defined person should be authentic and accessible to customers. Open-minded personalities have advantages in customer relations – a fact that should be used. If the person in charge is open to tips and coaching, it would be advisable to use them, as positive aspects can be worked out well together with external professionals. Tip 2: It is important that every person who contacts customers on behalf of the winery represents the attitude, philosophy and basic values of the company and can provide professional information about the products. All persons who approach customers on behalf of the winery within the framework of sales, events, trade fairs and any form of presentation must be briefed accordingly.

Additional remarks will be found in the work sheet in appendix C.

- How is the figurehead perceived?
- How are other people associated with the business perceived?
- Is the share of purchased personnel sufficient?
- Can personnel costs be optimised?

The output of the evaluation of the personnel field of the winery will reveal optimal representatives of the company, ideally filled positions and optimised personnel costs.

7. Steps to success in the area of processes

Many processes accompany the daily business of a winery. For this reason, these processes must be optimised in terms of feasibility, procedure and usefulness.

Tip: All processes with suppliers or subcontractors as well as internal processes should be optimised and, if necessary, investments should be made to provide necessary equipment.

- Can the existing processes in the company be optimised in terms of:
  - Purchasing and procurement
  - Ordering system
  - Communication

- Is there a need for new tools?

In this case, answering the questions will lead to optimised processes.

8. Steps to success in the area of physical evidence

The last step should include all optimisations in the area of physical evidence and equipment.

Tip 1: Fixed opening hours are recommended because they are easy to communicate and easy to organise. Tip 2: All customers should be able to find their way to the winery easily, and directions should be provided on all communication media such as the winery's website, social media channels and printed material.

- Is the winery easily accessible and are opening hours clearly communicated?
- Can appropriate directions and signs be installed?
- Are there parking spaces nearby?
- Is there customer-friendly infrastructure?

The correct communication of the existing facilities and the optimisation of physical evidence and equipment, where appropriate, will improve the outward appearance of the winery.

9. The conclusion of the marketing communication model and summary of the most important findings in the area of communication

By dealing with all aspects of the winery and answering all questions from all parts of the business, a comprehensive model has been created that will serve as a roadmap for future operations.

After having worked through all three steps of the model in detail, it is necessary to put the desired result, which is now already visible on paper, into practice. In order to do this as well as possible, it is strongly recommended that the elaborated model be seen as the basis for all decisions throughout the implementation process. The tips given and benchmarks presented are intended to provide assistance in this respect as well. In the event that the wineries' own statements deviate significantly from the benchmarks listed or the aspired goal and improvement is desired in this area, the following procedure is recommended (a general answer is not possible due to the specifics of individual wineries):

1. Even closer examination of the business sector concerned: review of all data.
2. Consideration of whether with existing resources (financial, personnel, time) there is the possibility of making changes in the appropriate direction and approaching the benchmark or goal.
3. For areas which cannot be changed with existing possibilities, it is recommended to evaluate closely related business areas and, if necessary, make changes which have an impact on the affected area.

A particularly important aspect of the implementation of the bespoken tools is the regular review of the status quo and the corresponding notation of achieved intermediate goals.

The most important findings in the area of communication are presented below. This summarised practical checklist is intended to serve as a permanent "cheat sheet" and reminder for small and medium-sized enterprises in the Austrian wine business.

NOTA BENE – CHECKLIST FOR COMMUNICATION MEASURES

- Decide on which tools and channels you work with. The selected tools and channels should be implemented and operated professionally, according to the motto "rather do less but professionally than more but unprofessionally "!

- Communicate information about new products, great reviews, events, participation in trade fairs, promotions, new sales partners and general news!

- Inform existing customers via all channels that are available and regularly used (newsletter, website, social media, in person at the winery, at events and trade fairs)!

- Know where your new customers can be reached:
    - (Young) end consumers: *via social media, at events and possibly B2C trade fairs. Furthermore, it is advised to open the winery to customers and to sell from the farm.*
    - Resellers (trade, export and gastronomy): *at B2B trade fairs, events and via direct acquisition and processing through active contact*
    - Export partners: *at B2B trade fairs, events and via direct acquisition and processing through active contact. Information about the markets must be gathered in advance (e.g. via Chambers of Commerce, official agancies, etc.) !*

- Design your website responsively and shape the structure as consumer-friendly as possible! The following information MUST be available on the website:
    - Address and contact details
    - Wines currently on sale including prices
    - Sources of supply of the wines
    - Information about the winery and the winegrower
    - Upcoming events and fairs
    - News and interesting facts

- Use social media, provided that time and personnel resources are available for processing. Be aware that unattended channels have a negative impact on your business! Focus on one or two channels, for example on Facebook and Instagram!

- Consider and budget sales promotions for your distribution partners in advance!

- Participate in awards relevant for the target channels and countries and communicate good results immediately after they have been published via all your channels!

- Deploy public relations! Inform journalists actively about news from the winery and provide them with professional pictures!

- Place online advertising, especially in the social media sector (if your winery is present on social media channels). Avoid classic print advertising. If you still wish to place print advertising, it is recommended to do so only together with a distribution partner. In this case, there should be a nationwide distribution structure, which means that your wines should be available "everywhere" (especially in retail stores and online)!

- Offer a very good customer service. Short processing times and fast reactions in all channels are a must!

- Be aware that every single touch point with a customer can have an impact on the reputation and awareness of your winery. Each customer is a potential ambassador for the company. Take this fact into consideration and use it to your advantage!

- Use your personality (the personality of the winegrower or a responsible person) for marketing communication purposes. By presenting the person behind the product, the customer is given the opportunity to identify with the winery!

- Do not be afraid to make use of assistance!

- Review your performance regularily (at least twice a year) and evaluate the methods applied in order to continuously optimise the strategy and correct it if necessary!

Appendix C

Work sheet to the presented marketing communication model

Ad STEP 1 – Evaluation of the status quo

Ad 1: Evaluation of the business figures

Fill in the respective numbers:

Number	*EY 1*	*EY 2*	*EY 3*	*EY 4*	*EY 5*
Turnover					
Sales volume					
Profit/loss					
Production volume					

EY: examined year

Benchmarks from the Austrian wine industry (average data based on own research)*

Winery of 8.5 ha: turnover: EUR 250,000 | sales volume: 52,000 bottles

Winery of 45 ha: turnover: EUR 1,000.000 |sales volume: 200,000 bottles

Winery of 65 ha: turnover: EUR 1,500.000 | sales volume: 300,000 bottles

Note: for the wineries surveyed, production volumes were equal to sales volumes

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

Ad 2: Evaluation of the current situation of all products

- Which products are represented in the current range?

  List all products of your winery.
- Which products are sold in which quantities?

  Add to each product the quantity sold in the last three years.
- What are the production costs of each product?

  Indicate the production costs of each product.

Product	*Produced quantity*	*Sold quantity*	*Production cost*

Ad 3: Evaluation of the current pricing policy

- At what prices are the individual products sold and what is the margin of each product? *List the selling prices (e.g. farm-gate, reseller, export, etc.) and margins of each product.*

Product	*Price 1*	*Margin 1*	*Price 2*	*Margin 2*	*Price 3*	*Margin 3*

Benchmarks from the Austrian wine industry (average data based on own research)*

Winery of 8.5 ha: average price per bottle: EUR 8.85

Winery of 45 ha: average price per bottle: EUR 12

Winery of 65 ha: average price per bottle: EUR 16

Note: average spending by end consumers per bottle: EUR 6 to 14.99

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries*

- Describe your pricing policy. *Are your products high-priced compared to your competitors? Low-priced compared to your competitors? Are there fixed promotions? Are there (seasonal) fluctuations and promotions, such as sales promotions, 2+2 bottles free of charge, trade fair prices etc.? If so, what is on offer and when?*

Ad 4: Evaluation of the current distribution situation

- Where are the products sold?

List your sales channels below (e.g. trade, gastronomy, farm-gate sales, export)

What is the proportion of the various channels?

Sales channel	*Share of total turnover*

Which foreign markets are served, and which products are exported and at what prices?

Product	*Price*	*Market/Country*

<u>*Benchmarks for the Austrian wine industry (according to the Austrian Wine Marketing Gmbh (Österreich Wein, 2020b, p. 42))*</u> *Companies are considered export relevant from a production volume of 30,000 litres.*

Ad 5: Evaluation of the current customer structure

- What is the structure of the existing resellers and end customers and what share do the respective segments have?
  - *By sales volume (A, B and C-customers)*
  - *By geographical location*
  - *By age*

Resellers:

Resellers (top customers, e.g. 5 to 10)	*Turnover*	*Classification (A, B, C)*	*Geographical region serving, e.g. province*

End customers:

End customers (top customers, e.g. 30 to 50)	*Turnover*	*Classification (A, B, C)*	*Geographical region, e.g. province*	*Age*

Ad 6: Evaluation of the marketing communication activities

- Who communicates?
  List all the persons entrusted with communication tasks of the winery

<u>*Benchmarks from the Austrian wine industry (data based on own research*)*</u>

Winery of 8.5 ha: 1 person communicates (General Manager/ sales person)

Winery of 45 ha: 1 person communicates (Owner/ winegrower)

Winery of 65 ha: 5 persons communicate (General Manager and sales people)

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- What materials are available for communication purposes?
  - *Are there brochures, display materials, professional photos, etc.?*
- What are the costs of the individual materials and when were they last updated?

Material	*Costs*	*Last updated*

- Which information is communicated?

  What was communicated in the last year? E.g. new vintages, awards, events, news, etc.

- How is communicated?
  - Individual communication *(through personal conversations, personal e-mails and via telephone)*
  - Mass Communication *(through newsletter, advertising, posters, etc.)*

	yes	no
individual communication		
mass communication		

<u>*Benchmarks from the Austrian wine industry (data based on own research*)*</u>
Winery of 8.5 ha: Focus on individual communication
Winery of 45 ha: both individual and mass communication
Winery of 65 ha: both, but focus on mass communication

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

○ Which channels are used for communication?

Channel	*yes*	*no*
Website		
Social Media		
Newsletter		
Press work (Editorial coverage)		
Advertising, traditional		
Advertising, online		
Advertising, social media		
Channel	*yes*	*no*
Events		
Fairs, B2C		
Fairs, B2B		
Awards and ratings		

Benchmarks from the Austrian wine industry (data based on own research)*

Winery of 8.5 ha: Use of website, events, B2C-fairs and awards

Winery of 45 ha: Use of all the channels mentioned above except paid advertising

Winery of 65 ha: Use of all channels mentioned above

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

Answer the questions about the respective communication channels if you already use them:

- **Website**
  - *How is the website structured? E.g. how many sub-pages are there, is there a search function, are there links to other websites?*

- *Is all information easily accessible and also up to date?*

- *Is the website optimised for mobile use / all devices (mobile phone, tablets, etc.)?*

Benchmarks from the Austrian wine industry (data based on own research)*
Winery of 8.5 ha: Website is clearly structured on one page, no web shop included
Winery of 45 ha: Website is clearly structured and elaborate, including a web shop
Winery of 65 ha: Website is clearly structured and elaborate, including a web shop and English version

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Social Media**
  - *Which social media channels are served?*
  - *How often are these channels served and which content is published there?*
  - *Who is responsible for managing the channels?*

Social media channel	*Frequency of postings*	*Content*	*Responsible*

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>* *Winery of 8.5 ha: no social media presence* *Winery of 45 ha: Facebook and Instagram presence | each served 1/day | owner of winery is responsible* *Winery of 65 ha: Facebook and Instagram presence | each served 2-3/week | employee is responsible*

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Newsletter:**
  - *What is communicated?*

Fill in the current number of subscribers and how often the newsletter is sent.

Number of subscribers	*Frequency of sending*

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>* *Winery of 8.5 ha: no newsletter* *Winery of 45 ha: newsletter sent to 800 subscribers | quarterly | topics: news, events, awards* *Winery of 65 ha: newsletter sent to +5,000 subscribers | irregularly | topics: news, events, awards, special offers*

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Press work (Editorial coverage in newspapers, journals or websites)**
  - *How often are journalists and media provided with relevant information and professional pictures?*

- *Who is responsible for this?*

Benchmarks from the Austrian wine industry (data based on own research)*
Winery of 8.5 ha: no current presswork
Winery of 45 ha: 3 times /year | owner is responsible
Winery of 65 ha: as often as possible | 5 to 8 times a year | employee is responsible

** The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Advertising**
  - *How many advertisements have been placed in the last three years?*

  - *Which media were used for advertising?*

  - *What exactly was advertised?*

If yes with advertising, which costs occurred and what was the result?

Medium	*Costs*	*Result*

<u>*Benchmarks from the Austrian wine industry (data based on own research*)*</u>
Winery of 8.5 ha: no paid advertising
Winery of 45 ha: no paid advertising
Winery of 65 ha: regularly |5 to 8 times/year

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Events**
  - *In which events has the company participated in the last three years?*

  - *Which events has the company organised itself in the last three years?*

  - *What costs have been incurred for the participation in events and what was the result of the participation?*

Events	*Costs*	*Result*

<u>*Benchmarks from the Austrian wine industry (data based on own research*)*</u> *Winery of 8.5 ha: participation in 5 events/ year and organisation of 2 events/year* *Winery of 45 ha: participation in more than 20/year (tastings) and organisation of 2/year* *Winery of 65 ha: participation in more than 25/year (tastings) and organisation of 2/year*

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Fairs**
  - B2C: *In which end customer fairs has the company participated in the last three*

  - B2B: *In which B2B (business customer) trade fairs has the company participated in the last three years?*

  - *What costs have been incurred for the participation in fairs and what was the result?*

Fairs	*Costs*	*Result*

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>*
Winery of 8.5 ha: participation in 2 fairs (B2C)
Winery of 45 ha: participation in 2 fairs (B2B)
Winery of 65 ha: participation in up to 5 fairs (B2B and B2C)

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

- **Awards and ratings**
  - *In which awards does the winery participate? Which products are rated?*
  - *What costs have been incurred for the participation in awards?*

Awards	*Costs*	*Result*

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>*
Winery of 8.5 ha: participation in 3 awards
Winery of 45 ha: participation in 4 awards
Winery of 65 ha: participation in 5 awards

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

Ad 7: Evaluation of the acting people

- Who is the face of the company?
  - *Was a face defined?*

- *Who else is identified with the company (from the customers' viewpoint)?*

- *What does he/she transport? Examples of values that can be transported could be honesty, reliability, high quality awareness, passion for wine, etc.*

- What is the share of purchased personnel services?

- What are the personnel costs?
  - *What is the number of hours of persons who are employed and also those who work for your company free of charge? Allocate these hours at an average hourly rate.*

Personnel	*Costs*

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>* *Winery of 8.5 ha: Face: General manager | additionally: cellar master* *Winery of 45 ha: Face: Owner* *Winery of 65 ha: Face: General manager | additionally: salespeople*

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

Ad 8: Evaluation of the processes

- How is the regular course of events in the company in terms of:
  - purchases

  Who decides and who executes?

  - orders

  Who decides and who executes?

  - communication

  Who decides and who executes?

- How often are processes changed/questioned?

Ad 9: Evaluation of the physical evidence

Does the company fulfil the following characteristics?

Characteristics	*yes*	*no*
Is the company accessible to customers?		
Is it easy to find?		
Is it accessible by public transport?		
Are parking spaces offered?		
Are there sanitary and washrooms?		
Are there seating facilities?		
Is there background music in the salesroom?		

<u>Benchmarks from the Austrian wine industry (data based on own research)</u>*

Winery of 8.5 ha: Winery is accessible by car | parking spaces offered, but not easy to find | sanitary rooms and seating available | no music

Winery of 45 ha: Face: Winery is accessible by car | parking spaces offered, easy to find | sanitary rooms and seating available | no music

Winery of 65 ha: Face: Winery is accessible by car | parking spaces offered, easy to find | sanitary rooms and seating available | lounge music in salesroom

* *The author researched this reference data in the summer of 2020 by means of telephone interviews with 6 Austrian wineries.*

Ad 10: Evaluation of the basic philosophical orientation and vision

- What does the company stand for / which values are important?
  - *Are there any special features to be mentioned, such as the orientation of the winery? What are the core values? E.g. authenticity, sustainability, etc.?*

- What is unique about the winery?
    - *What is special about the winery, e.g. organic wine-growing, certified in the areas of xy, unique location, history of the family, architecture of the winery, particularities in distribution, etc.?*

- What is the company proud of? What is it particularly good at?
    - *All areas should be considered here (not just production), for example: The winery is particularly popular with farm-yard customers, has special labels, etc.*

- Which products stand out?
    - *List these products and the reason why they are special.*

Ad STEP 2 – Definition and formulation of objectives

Ad 1: Objectives in the area of business figures

Write down YOUR objectives in the area of business figures.

- *E.g. should more profit be made and if so, by how much?*

Ad 2: Objectives in the area of products

Write down all YOUR goals related to the product area.

- *E.g. should a larger quantity of wines be sold?*
  - *If so, of which products in particular?*
  - *Why were these products chosen?*

- *E.g. should products be removed from the range and if so, which?*

- *E.g. should other/further products be added to the range and if so, which?*

Ad 3: Objectives in the area of pricing

In the following all YOUR objectives in the area of pricing shall be mentioned.

- E.g. should be sold at a higher price?
  - *If so, which products in particular?*
  - *Why were these products chosen?*

Ad 4: Objectives in the area of distribution

The next step is to describe all YOUR targets in terms of distribution and sales channels.

- *E.g. should other/further sales channels be developed?*

- *E.g. in which (new) markets should the wines be represented and is there sufficient background information about these markets?*

Ad 5: Objectives in the area of customers

Subsequently, all YOUR targets in the area of customers shall be presented.

- E.g. which (new) customer groups should be served?
  - *Is there sufficient background information about these groups?*

Ad 6: Objectives in the area of marketing communication

Objectives should also be noted in the area of the winery's marketing communication policy.

- *E.g. should the winery's reputation awareness be enhanced?*

- *E.g. should more editorial mentions in the media be achieved?*

Ad 7: Objectives in the personnel area

The next step deals with YOUR goals in the personnel area.

- *E.g. should existing employees take over further tasks? Or receive training?*

Ad 8: Objectives in the area of processes

Targets in the area of processes in YOUR company should be given space here.

- *E.g. should orders be processed faster by a certain percentage?*

Ad 9: Objectives in the area of physical evidence

In this step, YOUR objectives in the field of physical evidence will be identified.

- *E.g. should new equipment be installed?*

Ad 10: Objectives in the area of the philosophy of the business

All objectives that are related to the philosophy of the house should be mentioned here.

- *E.g. should further/other values be generated?*

Ad 11: Further objectives

It is essential to define and record all YOUR objectives across all business units, such as goals concerning the people, processes, physical evidence or philosophy of the winery, but also further goals not related to the areas mentioned.

- What other goals can be defined?
    - *Describe any further objectives in as much detail as possible.*

Ad STEP 3 – Implementation of the defined measures in order to achieve the set objectives

Ad 1: Steps to success in the area of products

- Which products can/should be dispensed with (slow sellers)? *See step 1.*

- Can/should new products be introduced?
  - *New production methods? Trendy products? Do they fit the philosophy of the winery?*

- Do the products meet the taste of the markets the winery wants to be present in?
  - *If not, how should they be adapted? E.g. more residual sugar, etc.*

Optimised products tailored to the desired target groups possibly taking trends into account. *Present your optimised product range:*

- Can production costs be optimised?
  - *If so, how? What are the new costs?*

Product	*Current production costs*	*Optimisation method*	*Optimised production costs*

Ad 2: Steps to success in the area of price policy

- Can sales prices be optimised?
  - *If yes, what are the new sales prices?*

Optimised product	*Optimised sales price 1*	*New margin 1*	*Optimised sales price 2*	*New margin 2*	*Optimised sales price 3*	*New margin 3*

- Can the pricing strategy be optimised?

For example: taking of additional or other actions, by encouraging other partners, etc.

Ad 3: Steps to success in distribution channels

- Are there channels, in which more/less wine should be sold?
  - *If yes, which and why?*

- Should less/more/other markets be served?
  - *If yes, which and why?*

Ad 4: Steps to success in customer segments

- Are the customer segments fit for the future? Could parts of the segments break away in the next few years? If yes, which? *See Step 1.*

Optimised customer structure for the winery. *Present your optimised customer structure:*

Ad 5: Steps to success in marketing communication

- Is it possible to optimise the communication methods of the person(s) in charge?
  - *Is training etc. necessary for this?*

List your person(s) in charge:

- Can existing marketing communication materials be optimised?

In terms of cost of production, user-friendliness, design, etc.

List the optimised materials:

- Can costs related to marketing communication materials be optimised?
  - *If yes, which and how? E.g. other suppliers, different materials, etc.?*

List the optimised prices here:

Optimised materials	*Optimisation potential*	*Optimised costs*

- Can more or other information be communicated?

List all information to be communicated:

- Can additional communication channels be used? If so, which ones? *See Step 1.*

List the communication channels you plan to use here:

- Events
  - *Can the participation in events be optimised? Which events "must" the company participate in? Where is participation not necessary / suitable for the company?*

List all planned event participations:

List all planned events organised by yourself:

- Trade fairs
  - *B2C: How can participation be optimised to achieve greater success? Should the winery continue to participate in fair(s) they have participated?*

List all planned end customer fairs and indicate what you could improve:

- *B2B: How can participation be optimised to ensure greater success? Should the winery continue to participate in fair(s) they have participated?*

List all planned B2B fairs and indicate what you could improve:

- Awards and ratings

Are there any awards/ratings that go better with the products? Should other products be rated? If so, which ones?

List the desired ratings for your winery and products here:

Ad 6: Steps to success in the personnel sector

- How is the figurehead perceived?
  - *Does he or she need coaching? Are there perceivable deficits? Are there any positive aspects that can be brought out more?*

List the qualities of the representative and indicate what you want to optimise in the future:

- How are other people associated with the business perceived?
  - *Is there a need for coaching? Are there noticeable deficits? Are there any positive aspects that can be worked out more?*

List the qualities of the other persons and indicate what you would like to optimise in the future:

- Is the share of purchased personnel sufficient?
  - *Or is it too high? Where could the company need help in the form of personnel support/expertise?*

List your optimised personnel capacities:

- Can personnel costs be optimised?
  - *If yes, how? What are the new costs?*

Personnel	*Optimisation potential*	*Optimised costs*

Ad 7: Steps to success in the area of processes

Many processes accompany the daily business of a winery. For this reason, these processes must be optimised in terms of feasibility, procedure and usefulness.

- Can the existing processes in the company be optimised in terms of:
  - Purchasing and procurement

    Are there alternative suppliers?

List the optimised processes:

- Ordering system

  Are there alternative possibilities?

List the optimised processes here:

- Communication

  Can communication activities be changed/accelerated?

List the optimised processes here:

- Is there a need for new tools?

For example: new customer database, new production and assembly lines, new hardware (slow, outdated computers)?

List your needs below:

Ad 8: Steps to success in the area of physical evidence

- Accessibility of the winery: *Should the customers come directly to the establishment and if so, at what times?*

Indicate the opening hours:

- Location of the winery: *Can appropriate directions and signs be installed?*

Specify possibilities for better signage:

- Accessibility by public transport: *Is this noted on the website?*

State how you will communicate this information:

- Parking spaces: *Is this noted on the website?*

State how you will communicate this information:

- Customer-friendly infrastructure (e.g. sanitary and washrooms, seating facilities, background music, etc.): *Is this communicated accordingly?*

State how you will communicate this information:

Please return to appendix B to number 9 continue.