

Small Australian wineries: surviving or thriving?

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*The authors acknowledge the support of the Australian Grape and Wine Research
Development Corporation and the Faculty of Business and Law at Edith Cowan University
who provided funding grants for this project.*

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ABSTRACT

The Australian wine industry is dominated by small wineries and has experienced a large number of new entrants over the past ten years. With greater competition the importance of exports and wine tourism has increased, suggesting that business and management skills will be critical to the survival and prosperity of individual wineries. This paper identifies the key management skills in running a successful winery business and explores the existence of these skills within the industry, based on factors including motivation to enter the industry, size, markets and backgrounds of the winery owners. Information was obtained through interviews with owners and managers of small wineries in the four main wine regions of Western Australia.

Whilst a set of universal management skills are identified by the owner/managers, these are not universally held. This reflects the diversity within the industry and a range of typologies of wineries is presented which highlights the characteristics of each in terms of the owner's backgrounds and motivation to enter, measures of success, management skills and business performance.

Keywords: Australian wineries, small business, small business management, management and business skills

INTRODUCTION

The Australian wine industry is characterised by many small wineries with the owners and managers often running complex operations involving the primary production of grapes, wine making and operating tourism related activities such as cafes and restaurants. Recent figures (ABS, 2006) indicate that while 14 percent of wineries account for 75 percent of wine grape production, there are some 1,800 wineries in Australia. A rapid growth in the number of wineries over the past decade (600 new wineries since 1999) has increased competition and raised issues regarding the quality of managerial expertise, given the varied backgrounds of those who have been attracted to new ventures in wine production. In the Margaret River region of Western Australia alone, the number of wineries has more than doubled from 50 to over 100 in the last 10 years. Whilst local production has increased in a market which has not seen local consumption grow at the same pace, the level of competition has increased and many local producers have increasingly sought overseas markets for their products. This places pressure on performance and consequently managerial and business skills, as survival in the longer term will depend on these.

To date there has been limited research into the management and business skills in the industry. Such issues are important since long term survival in the industry will require more than simply passion for wine making, farming diversification or tax incentives. This paper focuses on what winery owners regard as critical management skills in the industry and what skills they actually have.

REVIEW OF THE LITERATURE

The motivations for people choosing to start their own business will impact on all managerial decisions there on after. The expression of being either ‘pulled’ or ‘pushed’ into starting a business has been used extensively in the small business literature (Brodie and Stanworth, 1998; Buttner and Moore, 1997; Hamilton, 1987). A ‘pull’ motivation is associated with the individual having a reasonably strong positive internal desire to start a business venture. The opposite motivation is ‘push’, which is associated with a possible equally strong desire, but based on external negative reasons, for example, dissatisfaction with current employment. The vast majority of wineries would be expected to fall into the pull category.

These affective “pulls” include: personal freedom, independence gained from being one’s own boss, personal satisfaction, a less rigid, more flexible lifestyle and greater job satisfaction (Birley and Westhead, 1994; Brush, 1992; LeCornu, McMahon, Forsaith and Stanger, 1996; Loscocco, 1997). An alternative descriptor of small businesses who are motivated by personal rather than financial goals is “lifestyle” businesses and these business owners are often not interested in financial gain or business development or growth (Beaver, 2002; Walker and Brown, 2004). Again it would appear that this descriptor is extremely apt for the owners of small wineries.

These intrinsic lifestyle measures have also been referred to as psychic rewards by Owen, Carsky and Dolan (1992) or psychic income by Wheelock and Baines (1998) and are helpful in explaining personal objectives and goals of the small business owner. What is interesting about these motivations is that they are outside the conventional economic paradigms of small business success and it would

be true to say that many small business owners, regardless of industry, are not driven by financial reward and seek personal satisfaction above economic goals (Walker and Brown,2004).

This may explain why some owner/managers of small wineries appear to be less financially driven and are motivated predominately by an internal “passion” for the fruits of their labours. Pragmatically however it also highlights the difficulty for the industry in trying to assist in its sustainability, if many are only interested in their own personal goals rather than the seeking to improve the industry overall. Regardless of industry, all business owners need a set of business skills and what they have in their skills toolkit will affect how well they manage their business. The wine industry does appear to have some unique characteristics in regard to the type of person that chooses this industry and this is reflected in their management competencies.

In the broad context Fuller-Love (2006) found that the literature on management development in small businesses found leadership and management, management system development and team skills to be important for business survival, growth and performance. Delegation, financial management and planning skills were also rated high in importance. UK research by Kitson and Wilkinson (1998) found positive links between training and business performance, growth and innovation. Entrepreneurs may have particular attitudes which inhibit participation in management training and development. Furthermore, they may not be motivated by business growth but rather lifestyle (Gray, 2002).

Three factors in particular may suggest that adequate managerial skills are more at risk in the wine industry than in some other business sectors. Firstly, the lifestyle attraction of growing grapes and producing wine (Charters and Loughton, 2000) has attracted people from varied backgrounds to start up or acquire ventures in wine production and related activities. These people have joined the wine industry from other professions where (for example, in the case of doctors and lawyers) they are highly qualified technical experts but may not have been involved in the operational and managerial aspects of their occupations.

Secondly, the operation of a small winery can be particularly complex; with at least three facets, including primary production (grape growing), secondary manufacturing (wine production) and

possibly tertiary activities (cellar door sales, restaurants) (Carlsen, 2004). Hence a wide range of skills, knowledge and expertise is needed by the owner/manager, including technical skills associated with viticulture and wine making and broader business and managerial skills such as the ability to develop business plans, export strategies, and recruit and manage a range of expert staff. Multi managerial roles are applicable including sales, production and finance.

Thirdly, the Australian wine industry is perceived to be 'successful' due to its rapid growth and its profile in the popular media. The result of this focus on increasing production to meet perceived demand (Beverland and Lockshin, 2001) or marketing the results of production, has meant less emphasis directed towards improving the overall managerial skills and competencies of the owner/managers. The net effect of this is that most activity has been on the operational aspect of wine production, rather than a longer term strategic focus of sustainability of the industry as a whole and therefore the people involved and their business needs.

Many studies of the wine industry have focussed on specific aspects of the business such as, accounting (Blake, Amat, and Dowds, 1998), quality in the manufacturing process (Orr, 1999), export (Suarez-Ortega, 2003; Wickramasekera and Bamberry, 2003; Wickramasekera and Oczkowski, 2004), the use of technology (Sellitto, Wenn, and Burgess, 2003) customer service (O'Neill, Palmer and Charters (2002) and marketing (Beverland, 2005; Corkindale, 1991; Corkindale and Welsh, 2003; Edwards, 1989; Odorici and Corrado, 2004; Spawton, 1989; Thode and Maskulka, 1998). Harfield (1999) focuses on the New Zealand wine industry and identifies factors required for success at both an individual and collective level. However, as with Beverland (2000), the study did not seek to explore whether managers in individual businesses have the required skills to effectively employ the practices identified.

A smaller number of studies have explored areas of training and various aspects of business skills. Becton and Graetz (2001) consider the barriers to training for small businesses in the rural tourism sector. Reporting on a survey conducted by Tourism Training Victoria in 1996, they identify a shortage of skilled staff and a lack of management skills or training among owner-managers. They

suggest, however, that managers are aware of the problem but are deterred from accessing training due to the inflexibility of delivery modes and locations. This is a common issue for most small businesses irrespective of industry type or geographic location (Billett, 2001; Storey 2004; Webster, Walker and Brown, 2005; Thach, Halhoul and Robertson 2005) consider management practices in the American wine industry with a strong focus on the human resource management aspects of the business. They find that business have a significant concern with attracting and retaining quality staff but do not comment on the adequacy of management knowledge and skills in human resource management. To conclude, the sound management of small wineries is important economically, both at a national level but also at an individual level, as poor management can lead to business failure. The key question therefore is how managerially competent are the owner/managers of small Australian wineries?

METHODOLOGY

The main focus of this research study was the managerial competencies of winery managers in Western Australia. As nothing like this had previously been undertaken it was felt that the study should use qualitative methods to gain a very broad perspective on the issues facing the owner/managers, their background, needs and ability to manage effectively; a 'total' picture of a specific sample, rather than generalisable data on specific topics, was sought (Calder, 1977). Whilst dealing with management issues the interview questions also, in passing, invited comment about the background to the business, asked interviewees about how they measure success, investigated what the most satisfying areas of running a business were, and inquired about their plans for the future.

A semi-structured interview guide was constructed as the principal data collection instrument. This process was adopted to ensure some continuity of information between informants, but to be flexible enough to allow other information and ideas to inform the data collection process, and to allow less cognitive and – perhaps – unconscious aspects of managing the business to be elicited (Fontana & Frey, 1994). The interviews sought answers to the following questions:

- What do winery owners see as the major management and business skills to be successful?

- What is the general level of managerial skills which currently exists in the industry?
- What and how might training help?

The interview schedule covered the following: Demographic and background information, the role of the owner/manager, the management of the business and the future plans for the business. Demographic and background information included the size of the business, its outputs, how the business was organised and its target markets. Background information on the owner/manager included aspects such as how they entered the wine industry, previous managerial expertise, relevant qualifications, how success of the business was measured and trends in the business success/performance and the main factors contributing to this success.

In relation to the role of the owner/manager questions included how time is divided amongst the various areas of the business. What areas of running the business were through to be most difficult and the most satisfying. What skills they felt were needed to continue to develop the business and what training they attended during the previous years. In regard to the general management of the business questions included who else was involved in the business and the roles that they carry out. Where there any issue with managing the agents (distributors, restaurant franchisees, bottlers). What staff skills needed to be developed to continue to grow the business and ways in which to access and learn new skills and information for business development. Finally questions regarding the future involved what were their retire plans, if any, and how they saw the business developing over the next 5-10 years

A sample was selected on the basis of providing a good mixture of small family run businesses and some medium sized ones. They consisted of various sizes (in terms of annual wine production), ownership type and number of years in business. Thirty individuals were interviewed for this study, across four wine regions in Western Australia (Margaret River, Peel, Great Southern, Swan Valley). The selected interviewees provided what was considered a representative group of small and medium

sized businesses from each of the four wine producing regions. The interviewees were generally owner-managers, and often also the winemaker, but in two cases interviewees were managers or CEOs employed to run the wine business, and therefore had no ownership of the organisation. The majority were male, although most classified themselves as family businesses and had either their spouse and/or their children working in the business, although not necessarily in a full-time capacity. The wineries varied in size from a production of 500 cases of wine per annum to 100,000, at an average of 13,800. The wineries had been operating from between 2 and 74 years, with an average age of 15 years. Nine of them had associated tertiary activity such as a café or gallery, and all but two had a cellar door regularly open to the public.

FINDINGS

Over eighty percent of the owner/managers had had previous or other business ventures (including property development, farms, catering, architect and project engineer) and found that a range of business skills acquired and developed in that context had helped in the wine industry. Approximately forty percent had small business management and ownership experience and general skills such as planning, finance and sales. In relation to their business backgrounds some of the owner/managers had tertiary qualifications and others had management diplomas or had attended short courses and programs on management and business skills. Those with tertiary qualifications were sometimes in very diverse areas such as zoology, botany and geology while others were in business/commerce and law. As to what was required to run a successful winery business, a range of managerial and business skills were identified by those in the industry as being important. For some skills their importance was recognised by most respondents while for others there were different opinions based on a range of factors such as the wineries size, ownership and the interviewee's measures of success in the industry. When asked about their own existing skill set a vast majority of interviewees focused on operational skills such as viticulture and wine production rather than generic management skills held. When pressed the key management skills required to run a successful small winery were marketing sales and distribution, financial, and strategic management.

Over seventy percent of interviewees indicated that marketing and sales skills were of very high importance in the industry regardless of whether they were focused on selling locally or internationally. There are many dimensions of marketing including the ability to understand international markets, distributors and agents, cellar door sales skills and managing relationships with distributors and customers. Little distinction was made between marketing and selling. A factor often mentioned was the need to be careful in selecting a reliable distributor, and one who worked for your brand. Often, however, it seems as though export markets were established opportunistically and reactively – someone asked to import the producer’s wine – rather than by any process of careful planning and investigation. The importance of sales and marketing skills in cellar door operations was also acknowledged by a significant number of managers (over seventy percent). Whereas all of the owner/managers acknowledged the importance of marketing only a few owners had marketing and sales backgrounds prior to becoming an owner and/or manager of a winery. Some had attended seminars and courses to develop these skills but most had not. The general comment by the respondents was that they felt they could do the marketing themselves, that it was a relatively straightforward exercise and that they were competent at marketing the business as they were such an innate part of the business, they just ‘knew’ how to do it.

Over eighty percent of respondents identified sound financial management as an important skill for long term survival, although it was not actually apparent in practice at a number of wineries. Many wineries are not operating at a profit so have to be subsidised from various sources. About a quarter of the sample of wineries, for example, were owned by professionals such as doctors and lawyers who still worked part-time in their profession and used this income to subsidise the winery; others are part of a broader family farming business and some are almost part-time activities supported by full-time employment. Whilst a number of owners did not have financial skills themselves, they usually employed accountants for advice. However, some expressed concern that they did not fully understand the financial aspects of their business, particularly as it grew and became more complex. Virtually all interviewees had some basic understanding of “bookkeeping” for a very small business but also relied

on advice from their accountant. Few had any understanding of financial ratios, borrowing costs and the complexities of taxation. Overall many felt this lack of financial acumen left them exposed, as they were not equipped to judge the quality of the advice they received.

Strategic management is seen as a key competency in all businesses and the wine industry is no different. Strategies aimed at developing the brand name and markets were seen as particularly important by all interviewees. The ability to plan for changing consumer tastes and the changing wine marketplace and the ability to adapt to this was also considered to be an important skill. Financial planning strategies also come high on the list of required skills. However the interviews revealed little evidence of strategic planning for the future of their businesses. Whilst virtually all thought that they had reasonable strategic management abilities they also conceded that they could be better at this. Many of the smaller wineries had no specific long-term or strategic plans for their business and only vague thoughts about what their next development moves would be. This encompassed not just a lack of succession planning from those who felt that they were building a family asset but also a general lack of recognition from most about how, in the longer term, they would be able to realise the value of their asset once they no longer wished to actively be involved. Most tended to be reactive rather than strategic.

The widespread lack of comprehensive managerial and business skills found in the industry is no different to small business owners and managers in a broad range of industries. In assessing whether or not owners have adequate management skills is dependant on the measures which they use to assess if their businesses are successful. About a half of the sample are not seeking significant growth and are more interested in lifestyle and the production of good wine. A reoccurring comment was that financial success “would be nice” but they were prepared to persist with their passion and fund the business from other sources. However, for any business to have a stable future there must be a level of sound management, forward planning and financial success. Many of these businesses could not survive without financial subsidisation from some other source of income even though, in most cases,

a desire was expressed to give up the other income producing activity over time yet there was often no clear plan for how this might be achieved.

DISCUSSION

Like any industry which has a high proportion of small businesses, the management skills found in the winery industry along with perceptions of their importance varied and were influenced by a number of factors including: the background of owner(s), the winery location, the ownership of the business, be it family or shareholders, the market, the actual size of the business, the focus of the business and finally how the owner/manager measures their success. In order to capture and explain these variances within the industry and the implications for managerial and business skills, several typologies of winery owner/managers were identified. Based on the interviews, a pattern of wineries emerged around factors such as those listed above. They are not mutually exclusive groups with some wineries having characteristics of more than one type, and additionally, wineries may move between groups over time. The six typologies identified are; survivors, subsidisers, sophisticated farmers, succeeders, successors and skilled entrepreneurs. Following is an outline of some of the general characteristics of each group.

The first category is the survivors. These owner/managers are struggling financially but have the potential to improve. They may have been in operation for a long or short time and are not strongly motivated to make profits or to grow in size. Owners in this group may never have any intention of becoming large and profitable or alternatively, may ultimately be seeking profits. They may be family businesses which have been handed down over the years and where wine making may be seen more as a hobby and realisation of a passion for winemaking rather than a “true” business and therefore a modest income or even a subsidised business is the pattern. They may remain in the industry because it offers a lifestyle alternative. In other cases, the owner may have commenced a winery business with the intention of making good profits at some stage and this has not yet been realised. These may have some potential to be a profitable business. This group generally lacks sophisticated levels of management skills with some displaying wine making skills.

Survivors

- Financially struggling with potential to improve
- May have been in operation for a long or short time
- May not be strongly motivated to make profits
- May not be motivated to grow in size
- May be family businesses
- May be seeking profits in the longer term

The second category is the subsidisers. These owner/managers are not financially dependent on the business and the subsidisation may or may not be intentional but is likely to be subsidised by other capital or income from another job. Or the business may have been intentionally established to minimise tax on high income earners and subsidised from other income and because of this, may or may not be motivated to eventually run independently at a profit. These wineries are often managed by staff with the owner an absentee landlord and still be in start up phase of the business. Some referred to these owners as Pitt Street farmers. Management and business skills may generally be lacking in this group since the motivation to enter the industry may have been a hobby, a passion for wine and wine making or for tax advantages. The amount of money which they are prepared to spend on buying people with the relevant expertise is a factor which might impact on their success. Many owners considered building a wine business to be a long-term operation so that subsidisation was often considered a reality of the business. Time was required for vineyards to mature, to develop the quality of the wine, build infrastructure and gain brand recognition.

Subsidisers

- Not financially independent
- Subsidisation may be intentional or not
- May be family businesses subsidised by other capital or job income
- May have been intentionally established to minimise tax on high income earners and subsidised from other income

- May or may not be motivated to eventually run independently at a profit
- Owner may buy staff to manage (absentee landlord)
- May still be in start up phase of the business

The third category is the sophisticated farmers. These owner/managers have a farming background and moved into wine making due to poor returns from traditional crops or animal farming. They may have planted the vines and built the winery on land they own or have bought into an existing winery as they wish to return to the land. For these owners, the wine business is either part of a total range of activities or alternatively they may be owned and managed by people who have a background in farming and after a period of employment outside the sector wish to return to the land and a vineyard is seen as a better option than crops or animals. Where the vineyard is a part of a larger entity, there is the opportunity for subsidisation. Some of the sophisticated farmers have sound business sense in terms of financial management and a range of general skills which can remove the need for expensive labour. For example, mechanical know how from farming which can be used with wine making equipment.

Sophisticated Farmers

- Have a farming background
- Moved into wine making due to poor returns from traditional crops or animal farming
- May have planted the vines and built the winery on land they own
- May have bought into an existing winery as they wish to return to the land

The fourth category is the successors. These owner/managers may display a passion for wine making and have good skills at this. These businesses may be financially independent or subsidised, family owned business handed down to successive generations. Because of this the winery is a valuable real estate holding and those who have inherited the business may be less interested in wine making. This category business generally limited to a small scale production with limited or no exports and only small cellar door operation. Interestingly these owners may have poor marketing and financial skills.

Their key focus is a passion for wine making and what may have started as a hobby has become a small business. These tended to be found in the Swan Valley region of Western Australia with many such wineries being owned and run by people from a southern European background. Management skills in this group vary with some owners being more adept at making wine rather than running a business. Others had managerial and business experience which they had gained from either formal studies or work experience outside the winery.

Successors

- Family owned business handed down to successive generations
- Owners may display a passion for wine making and have good skills at this
- May have poor marketing and financial skills
- May be financially independent or subsidised
- Those who have inherited the business may be less interested in wine making
- Often have valuable real estate holdings
- Generally limited to a small cellar door operation
- Small scale production, limited or no exports

The fifth category is the succeeders. These owner/managers were operating a full business venture, not part-time activity, and were financially stable. They were very focused on marketing and for example spent much effort on developing the brand name. These may be very small family concerns or larger businesses (with up to 60 employees) and in each case were profitable, well run businesses. They may be relative newcomers, recent start-ups or longstanding businesses. Most had established relatively stable markets for their products which may be domestic and international or combinations and they may have a wine tourism focus. This group generally display reasonable levels of managerial and business skills which may have been brought to the wine business from other business interests or have been acquired through formal studies. The larger enterprises may be in a position to buy the relevant expertise.

Succeeders

- Making a profit
- Considered to be a full business venture not part-time activity
- May be sophisticated farmer, skilled entrepreneur or small family business
- Spend much effort on developing the brand name
- May be found in all regions

The sixth and final category is the skilled entrepreneurs. The businesses operated by these owners were based on a business plan. The owners were often shareholders and employed professional managers to run the enterprise. They were generally the larger small businesses and had developed both a good brand and also a successful tertiary business such as a restaurant. Generally there was not any family background or history in the wine industry by the owners and managers. Since they usually depend on funding from shareholders, financial and legal skills are important in addition to the range of other management skills such as marketing, HR and general quality management. Whilst they are primarily focused on large production and export sales, they may also have wine tourism operations with restaurants. These organisations are generally larger and had the financial resources to employ people with relevant expertise and skills.

Skilled Entrepreneurs

- Business is based on a business plan
- Owners are shareholders
- Professional managers run the enterprise
- Managers have brought business/management skills to the winery
- Managers may have previous experience in the industry or an understanding of it
- Generally larger small businesses
- Place much effort on marketing and developing the brand name
- Have reasonably large restaurant facilities
- Tend to be in the Margaret River region

CONCLUSION

Small and medium sized winery owner/managers identified a set of critical management/business skills required to be successful in the industry which include; marketing, strategic planning and management, financial management and HR management. In general, interviewees thought they possessed sufficient management expertise irrespective of whether they had had any formal training in such skills and believed they did not need any further training in these areas. However the business operations of many interviewees indicated that the reality of the management expertise fell short of their perception.

This research highlights the diversity of managerial skills which currently exist in the Australian wine industry and this is influenced by a range of factors including; size, motivation, measures of success and background experience. Six different typologies of winery owner/managers were identified based on these variations and were presented in this paper. Whilst it is difficult to pass judgement on whether any of these are preferred forms of business operation, there is a role for each and measures of business success may vary in each type. This research makes a contribution to the literature by identifying these skills; it also suggests that despite variances in the actual levels of these skills, small winery businesses can survive, at least in the short term without the owners and managers holding such skills. This reflects a variety of reasons for being in the industry. However, long term survival will need more than a passion for winemaking.

Some wineries will find it difficult to survive if success is measured using profitability, yet many owners did not see this as a primary driving force behind their business. Different measures of success and performance are used by each winery and this means different skills might apply or be seen as important. As a case in point, the owner of a third generation family winery in the Swan Valley may be quite content to make a modest living out of a small vineyard and a small weekend cellar door operation. Seeking sales to major retail outlets or international markets may be well beyond their

expectations and desired strategy. On the other hand, a husband and wife team may have a small scale operation in Margaret River which has identified a niche market overseas and successfully exports eighty percent of production. Clearly, different skills are important in each case, but what is important is that they each have a strategy and should therefore identify the key skills required to achieve their strategy.

In terms of the provision of business skills training for the industry, there was relatively universal agreement that this would be most acceptable if done in an industry context where business owner/managers view the training provider as part of the industry. Local industry associations had provided some training in management and general business skills in addition to viticultural subjects.

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