

# Mid-term evaluation of the Export and Regional Wine Support Package (ERWSP): final report

Williams, Wilcox, Ball and Pattinson

## Wine Australia

15 November 2018



## ACKNOWLEDGEMENTS

Forest Hill Consulting and its collaborators wish to thank the numerous people who assisted the consultancy team in the conduct of this review. In particular, we thank Andreas Clark, Kate Harvey, Hannah Bentley, Brett Murphy and other staff at Wine Australia who promptly responded to our requests for information or assistance to organise meetings with stakeholders. Thanks are also extended to wine sector participants and other stakeholders who provided time for the interviews.

## DISCLAIMER

The information contained in this document has been gained from anecdotal evidence and research. It has been prepared in good faith and is based on a review of selected documents and interviews with a range of stakeholders. Neither Forest Hill Consulting nor its servants, consultants, agents or staff shall be responsible in any way whatsoever to any person in respect to the report, including errors or omission therein, however caused.

## DOCUMENT VERSION

REPORT STAGE	AUTHORS	DATE	REVIEWERS	REVIEW DATE
Draft	Scott Williams, Chris Wilcox, Alex Ball, Russell Pattinson	26/10/18	Brett Murphy	2/11/18
Final	Scott Williams, Chris Wilcox, Alex Ball, Russell Pattinson	15/11/18		

## CONTACT DETAILS

PO Box 465 Creswick VIC 3363

Scott Williams: +61 413 059 190, [scott@foresthillconsulting.com.au](mailto:scott@foresthillconsulting.com.au)

# CONTENTS

EXECUTIVE SUMMARY .....	5
ACRONYMS AND ABBREVIATIONS.....	6
<b>1. INTRODUCTION.....</b>	<b>7</b>
1.1 Purpose of the mid-term evaluation.....	7
1.2 Review methodology .....	7
<b>2. OVERVIEW OF THE ERWSP.....</b>	<b>9</b>
2.1 Background.....	9
2.2 Aims and programs.....	9
2.3 Structures.....	11
2.4 Management processes .....	12
2.5 Key documents .....	13
2.5.1 Funding agreements .....	13
2.5.2 Business plan.....	14
2.5.3 Annual operating plans .....	14
2.5.4 Other documents.....	14
<b>3. PROGRESS BY PROGRAM.....</b>	<b>15</b>
3.1 Program 1: Accelerating growth in international demand.....	15
3.1.1 Progress against scope.....	15
3.1.2 Progress against budget .....	16
3.1.3 Progress against M&E Plan .....	16
3.2 Program 2a: Creating China-ready businesses – capability building .....	18
3.2.1 Progress against scope.....	18
3.2.2 Progress against budget .....	18
3.2.3 Progress against M&E Plan .....	19
3.3 Program 2b: Creating China-ready businesses – Wine export grant scheme and program 3: Capturing growth in wine regions .....	19
3.3.1 Progress against scope.....	19

3.3.2	Progress against budget .....	20
3.3.3	Progress against M&E Plan .....	21
3.4	Program 4: Transforming cider businesses .....	22
3.4.1	Progress against scope.....	22
3.4.2	Progress against budget .....	23
3.4.3	Progress against M&E Plan .....	23
3.5	Whole-of-package.....	24
3.5.1	Progress against budget .....	24
3.5.2	Progress against M&E Plan .....	24

<b>4.</b>	<b>CONCLUSIONS AND RECOMMENDATIONS .....</b>	<b>28</b>
4.1	Key findings .....	28
4.1.1	Progress against scope.....	28
4.1.2	Progress against M&E plan.....	28
4.1.3	Other observations.....	28
4.2	Recommended adaptive management actions .....	28

<b>APPENDIX 1: DOCUMENTS REVIEWED .....</b>	<b>29</b>
---	-----------

<b>APPENDIX 2: MEMBERSHIP OF ERWSP GOVERNANCE GROUPS.....</b>	<b>30</b>
Phase 1 Steering Group members .....	30
Phase 1 Reference Group members.....	30
Marketing Advisory Group.....	31
Expert Assessment Panel .....	31
Cider Committee .....	32

## LIST OF TABLES

Table 1: Program 1 – progress against KPIs .....	17
Table 2: Program 2a – progress against KPIs .....	19
Table 3: Program 2b – progress against KPIs.....	21
Table 4: Program 3 – progress against KPIs.....	21
Table 5: Program 4 – progress against KPIs .....	23

Table 6: ERWSP – progress against high-level KPIs ..... 25

Table 7: Performance to date against key export targets ..... 27

## LIST OF FIGURES

Figure 1: ERWSP governance structure ..... 11

Figure 2: Program 1 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19 ..... 16

Figure 3: Program 2a financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19 ..... 18

Figure 4: Programs 2b and 3 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19  
..... 20

Figure 5: Program 4 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19 ..... 23

Figure 6: ERWSP financials (all programs) – business plan vs actuals / forecast in AOP 2017–18 and 2018–  
19 ..... 24

## EXECUTIVE SUMMARY

This report presents the findings of a mid-term evaluation of the Export and Regional Wine Support Package (ERWSP) managed on behalf of the Australian Government by Wine Australia. The terms of reference for the mid-term evaluation of the ERWSP were to assess the implementation of the project at the half way point of the project; assess progress against the scope of the project and the monitoring and evaluation framework; and provide recommendations on any adaptive management actions which would benefit the project. The evaluation was to consider the degree to which external factors are influencing achievement against key performance indicators as compared to the Package inputs.

The mid-term evaluation was undertaken in parallel with an independent performance review of Wine Australia required under its Funding Agreement with the Commonwealth. Both projects involved extensive document review and consultation with stakeholders. The mid-term evaluation drew heavily on the Package business plan, annual operating plans and monthly progress reports.

The ERWSP is very tightly managed by Wine Australia. Strong governance and delivery structures and processes have been established and these appear to be working effectively. Monitoring, evaluation and reporting is comprehensive and risk is managed systematically.

Overall, the Package is on track for delivery against the workplan. There has been some slippage against milestones and budget, notably in programs 1 ('Accelerating growth in international demand') and 2b/3 (grant programs – 'Creating China-ready businesses – wine export grant scheme' and 'Capturing growth in wine regions'). This slippage is expected to be caught up during 2018/19. KPIs for program 1 have either been met ahead of the target date or appear to be on track for achievement by 2019/20 as planned. The possible exception is the quality perception rating of Australian wine in the USA as measured by the Wine Intelligence brand health study. Related to this, the main concern for achievement of the Package-level KPIs is growth in USA export value. Progress towards achievement of KPIs is not yet measurable for programs 2a ('Creating China-ready businesses – capability building'), 3 and 4 (Transforming cider businesses').

There is and will be a problem with the attribution of observed measures of key performance indicators (KPIs) to the activities of the Package, particularly high-level KPIs. This is understood by Wine Australia and there are lower-level KPIs that help to provide a more complete picture of the ERWSP's impact.

On the strength of export values, the Package appears to be on track to meet or exceed its overarching KPI of a 5:1 benefit-cost ratio (BCR). However, many external factors will affect the actual BCR achieved, depending how the BCR is measured (in particular, whether a counterfactual is applied). Growth or otherwise in tourism expenditure will also affect the final BCR. Changes in this measure attributable to the ERWSP are not yet available.

No adaptive management actions are recommended beyond those that have already been identified by Wine Australia and its oversight and advisory committees.

## ACRONYMS AND ABBREVIATIONS

<b>AGWA</b>	Australian Grape and Wine Authority
<b>AOP</b>	Annual operating plan
<b>BCR</b>	Benefit-cost ratio
<b>CAGR</b>	Compound annual growth rate
<b>DAWR</b>	Department of Agriculture and Water Resources (C'th)
<b>EAP</b>	Expert Assessment Panel
<b>ERWSP</b>	Export and Regional Wine Support Package
<b>FOB</b>	Free on board
<b>KPI</b>	Key performance indicator
<b>MAG</b>	Marketing Advisory Group
<b>Package</b>	Export and Regional Wine Support Package
<b>WET</b>	Wine Equalisation Tax
<b>WFA</b>	Winemakers' Federation of Australia

# 1. INTRODUCTION

## 1.1 PURPOSE OF THE MID-TERM EVALUATION

This report presents the findings of a mid-term evaluation of the Export and Regional Wine Support Package (ERWSP) managed on behalf of the Australian Government by Wine Australia.

The terms of reference for the mid-term project evaluation of the ERWSP were to:

1. Assess the implementation of the project at the half way point of the project
2. Be undertaken by an external provider
3. Assess progress against:
  - a. scope of the project
  - b. monitoring and evaluation framework, and
  - c. provide recommendations on any adaptive management actions which would benefit the project.
4. The evaluation description should consider the degree to which external factors are influencing achievement against key performance indicators as compared to the Package inputs.
5. The evaluation reports should be accompanied by a management response from Wine Australia to the recommendations made.

The project evaluation focuses on the timeframe of 1 July 2016 to 30 June 2018.

## 1.2 REVIEW METHODOLOGY

The mid-term evaluation was undertaken in parallel with an independent performance review of Wine Australia required under its Funding Agreement with the Commonwealth.

The following approach was taken to the review. Note that the desktop review, consultation and reporting stages were overlapping.

1. Inception meeting: an inception meeting for the two projects, involving the Chief Executive Officer, General Manager Corporate Affairs and Strategy, Communications Manager and the consulting team was held in Adelaide shortly after the project start. The meeting addressed the scope of the two projects, Wine Australia input requirements (including access to documentation, personnel, stakeholders to be interviewed), output and reporting requirements and finalisation of timeframes. The consultants were also provided with background on Wine Australia and the wine sector.
2. Establishment of communication channels: a simple dedicated website and email address for submissions was established for the corporate performance review. The purpose of the site was to provide a communication channel with stakeholders that was clearly independent of Wine Australia. The website and the review itself were publicised by Wine Australia through its various email newsletters. Despite these efforts, no submissions had been received via the designated email address by the cut-off date.

3. Desktop review: documents relevant to the ERWSP were made available to the consultants via a secure portal and were progressively reviewed. A list of the documents reviewed is provided in Appendix 1.
4. Consultation: a list of interviewees for the two reviews was drawn up in consultation with Wine Australia. Individuals with experience of the ERWSP, in various forms, were included in the list. Stakeholder groups represented included personnel from the Wine Australia executive team and other managers, the Board, Winemakers' Federation of Australia (WFA), Australian Vignerons, state and regional wine associations, individual wine and grape-growing businesses, the Department of Agriculture and Water Resources (DAWR), the Council of Rural Research and Development Corporations and service providers to Wine Australia (research agencies, consultants and others).

The majority of the Wine Australia, DAWR and research provider interviews, and some others, were conducted face-to-face depending on practicality. The remainder were conducted by telephone. A semi-structured questionnaire was used as the basis for discussions. Interviewees were assured that their comments would be treated in confidence and, if reported, would be presented in way that did not allow the source to be identified.

A total of 53 individuals were interviewed for the two reviews, plus the President and Executive Officer of Cider Australia specifically for the ERWSP review.

5. Report: a draft report was submitted to Wine Australia for comment. Feedback on the draft was considered by the review team and changes made where required to produce the final report.

## 2. OVERVIEW OF THE ERWSP

### 2.1 BACKGROUND

In the decade leading up to 2014, the value of Australian wine exports decreased steadily from a peak of \$3 billion to a low of \$1.8 billion, exacerbated in part by an oversupply in wine production domestically, currency fluctuations regionally, and changes in consumer spending patterns internationally arising from the global financial crisis. At the same time, the Australian wine sector recognised that its export focus had been diverted to some extent by the attention it had directed to reform of the Wine Equalisation Tax (WET) Rebate, which was announced by the Australian Government in the 2016 Budget following extensive sector consultation. Enabling legislation for the amended WET Rebate, redesigned to counter excessive wine grape production and restricted to packaged Australian wine-branded products only, took effect from July 2018.

Also as part of the 2016 federal Budget, the Australian Government introduced the \$50 million ERWSP, a four-year initiative aimed at reinvigorating growth in major Australian wine export markets as well as stimulating international wine-based tourism within Australia.

For the first time Australia is mounting a dedicated, significant and sustained multi-year marketing campaign in markets with the strongest growth potential, particularly the USA and China, whilst also allowing flexibility to respond to signals in other markets where there is potential for export.

Sustained recovery in and increased value generation of wine exports, driven largely by growth at higher price points, will require substantial changes in perception and awareness of Australian wine in key export markets. Assisted by a fall in the Australian dollar and tariff reductions in these markets, the ERWSP is expected to drive demand for Australian wine abroad and showcase Australia's premier wine regions to international tourist markets.

The ERWSP business plan (phase 1) was developed collaboratively between key stakeholders the Australian Grape and Wine Authority (AGWA – now Wine Australia), Australian Vignerons and WFA with support from DAWR. The administrative elements of the ERWSP were set up in 2016-17 enabling three years of dedicated program funding to commence in July 2017 (phase<sup>1</sup> 2).

### 2.2 AIMS AND PROGRAMS

The ERWSP has been designed to deliver increased profitability for the sector and regional wine-producing communities, including beverage makers, growers and other regional businesses in the supply chain. In order for the ERWSP to deliver the largest and most sustainable export growth and the strongest support for increased international wine tourism, the following four programs, with their respective budgets, are being implemented:

---

<sup>1</sup> The words 'phase' and 'stage' have both been used – for example, 'phase' in the funding agreements with government and 'stage' in the title of the business plan. 'Phase' has been used throughout this report for consistency.

1. **China and USA marketing (\$32.5 million):** Targeted multi-year marketing campaigns that improve the perception and awareness of Australian wine in China and USA markets, as well as the premium paid.
2. **Capability development (\$2 million):** Development and delivery of education programs and toolkits to improve the capability of wine businesses to capture export opportunities and develop wine tourism products and services.
3. **Grants (\$11 million):** Wine export grants that build the capacity of small and medium wine businesses to capture export opportunities in China and the USA. State-based and competitive grants for initiatives that increase international wine tourist numbers and expenditure across the states and regions.
4. **Transforming cider businesses (\$0.5 million):** Development of a brand proposition and go-to-market strategy for the Australian cider sector based on detailed market analysis.

Wine Australia has projected that, once fully implemented, the ERWSP will:

- ⊕ Increase the value of wine exports by \$434–565 million to a record \$3.3–3.5 billion by 2021–22;
- ⊕ Deliver 7–8 per cent per annum value growth across all export markets from 2017–18 to 2021–22, including 15–17 per cent in China (including Hong Kong) and 6 per cent in the United States;
- ⊕ Increase the average price for Australian bottled wine exports free on board (FOB<sup>2</sup>) by 15 per cent;
- ⊕ Deliver higher returns to grape growers (capitalising on the historic correlation between grape prices and the average export price of wine); and
- ⊕ Attract 40,000 more international tourists to Australian wine regions by 2019–20, delivering an estimated \$170 million in value to the national economy.

Without the ERWSP, it is projected that wine exports would grow at a slower rate of 4 per cent per annum to reach \$2.7 billion by 2019–20.

Together, the four programs are anticipated to transform the sector and underpin its future prosperity through:

- ⊕ An improved perception of all Australian wines in the USA and China markets;
- ⊕ Sophisticated social media networks with a deep reach to consumers, particularly in China;
- ⊕ Enduring online educational resources for all potential and existing exporters and tourism-focused businesses; and
- ⊕ Building a stronger pull for Australia's food, wine and experience tourism leading to more visitors and more resilient and competitive wine-based tourism businesses.

---

<sup>2</sup> FOB: The 'free on board' value of wine is the point of valuation where goods are placed on board an international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.

## 2.3 STRUCTURES

Wine Australia is responsible for delivering the ERWSP in accordance with a funding agreement with the Australian Government, represented by DAWR (see section 2.5.1). ERWSP activities are undertaken via:

- ✦ Direct delivery by Wine Australia;
- ✦ Contracted delivery managed by Wine Australia; and
- ✦ Competitive grant processes administered in accordance with the *Public Governance, Performance and Accountability Act 2013* and the Commonwealth Grants Rules and Guidelines.

Wine Australia, Australian Vignerons and WFA have jointly signed off on the developed plans and campaigns to ensure all Australian wine exporters are supported through the proposed activities.

Phase 1, the development of the business plan, was overseen by a Steering Committee comprising the Chairs of Wine Australia and WFA and executive management from Wine Australia, WFA, Australian Vignerons and ACIL Allen. Development of the ERWSP business plan relied on ongoing consultation with the grape and wine sector, and significant input was provided by a Reference Group established by WFA, Australian Vignerons and Wine Australia, chaired by WFA, and comprising members with expertise in winemaking, grape growing and tourism drawn from a cross-section of regions.

The governance structure for phase 2 (implementation) is shown in Figure 1.

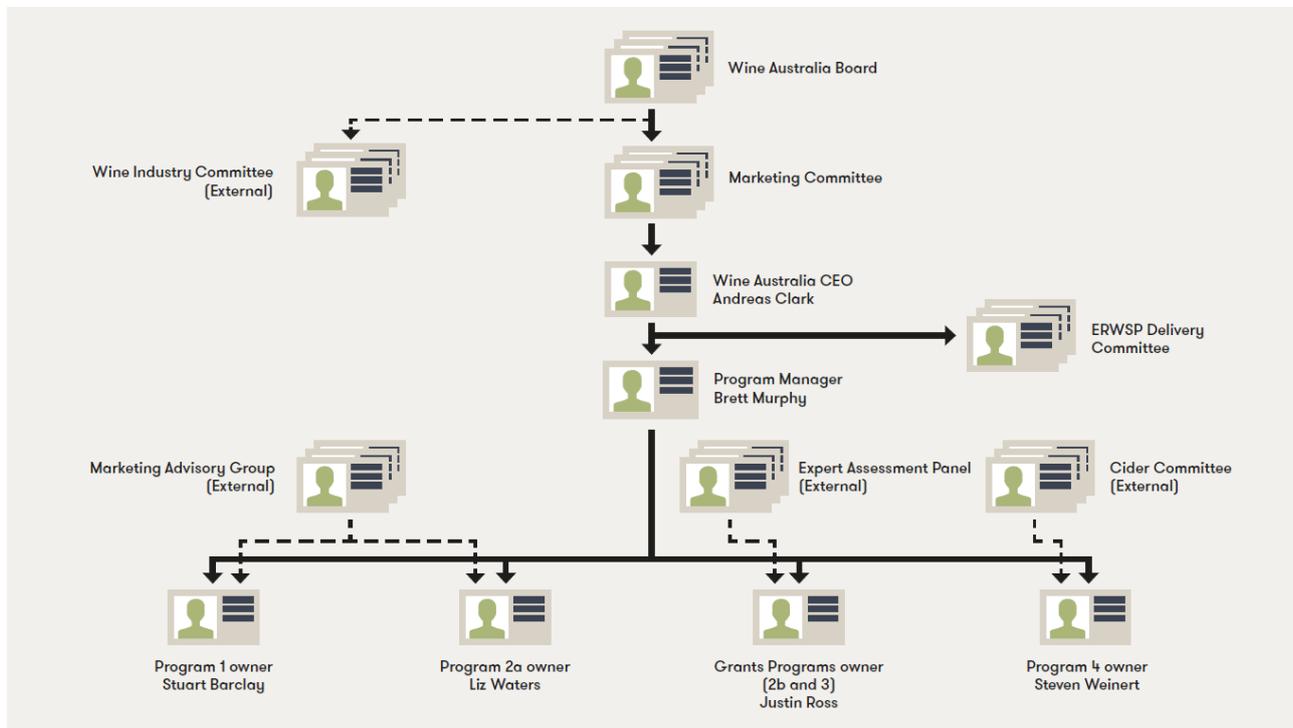


Figure 1: ERWSP governance structure

Source: ERWSP AOP 2018–19

A Wine Industry Committee was established to ensure appropriate sector oversight of the ERWSP through WFA and Australian Vignerons. Functions of this committee are to:

1. Review and agree:
  - ⊕ The three-year plan for the \$50m ERWSP;
  - ⊕ Annual operational plans (AOPs) for each of FY18, FY19 and FY20; and
  - ⊕ Recommend the AOPs be submitted to the Wine Australia Board for approval.
2. Conduct mid-year reviews to ensure the current year's activities are being implemented in accordance with the AOP for that year.

The Wine Industry Committee comprises the President of WFA and Chairs of Australian Vignerons and Wine Australia. It meets twice yearly: once to agree to the AOP prior to submission to the Wine Australia Board and again for a mid-year review of progress against the AOP. In addition, the Wine Australia CEO meets weekly with chief executives of WFA and Australian Vignerons and fortnightly with senior managers of peak state wine sector organisations.

A Marketing Advisory Group (MAG), which focuses predominantly on the USA and China initiatives, provides strategic guidance for the international marketing and capability development components of the ERWSP (programs 1 and 2) and endorsed the investment strategy in the business plan. The members of the MAG are senior executives of nine large exporting wine producers. Meetings are generally held quarterly and are timed around major decisions. MAG input helps the Board's Marketing Committee to ensure Wine Australia's marketing activities and those of the large companies are aligned.

Wine Australia has also appointed an independent Expert Assessment Panel (EAP) of five members with significant experience in regional tourism, wine tourism and/or regional economic development. The EAP provides sector and technical expertise in the assessment of state and competitive grant applications under programs 2b and 3. Probity advice is provided to the EAP by King & Wood Mallesons and Wine Australia provides secretariat support. The EAP acts in an advisory capacity to the Assistant Minister for Agriculture and Water Resources, who approves International Wine Tourism State Grants, and to Wine Australia's CEO, who approves the International Wine Tourism Competitive Grants.

Finally, there is a Cider Committee to support the delivery of program 4, 'Transforming cider businesses'. The Cider Committee comprises executive management from Wine Australia and WFA and the Executive Officer and President of Cider Australia.

Details of the membership of phase 1 and 2 governance groups are provided in Appendix 2.

Internally, Wine Australia's delivery is overseen by the Marketing Committee of the Board and the CEO-led Delivery Committee. A dedicated Program Manager, reporting directly to the CEO as a General Manager, was appointed in October 2017. Each program (1, 2a, 2b + 3 and 4) has an 'owner'. The Delivery Committee of 15 people comprises the CEO, the Program Manager, program owners, project managers and other members of the Wine Australia Executive Team.

## 2.4 MANAGEMENT PROCESSES

The Delivery Committee has met fortnightly since July 2017, face-to-face and by teleconference. Meetings follow a structured format and minutes with action lists are produced. The Program Manager prepares a monthly progress report with input from program owners, detailing:

- ⊕ Package success stories;
- ⊕ Package key performance indicators (KPIs);
- ⊕ Progress in each program, including:
  - ◆ A 'health summary'
  - ◆ Major activities / campaigns and achievements;
  - ◆ The program schedule, i.e. tracking against milestones;
  - ◆ Financials;
  - ◆ KPIs;
  - ◆ Risks; and
  - ◆ Issues;
- ⊕ Budget and forecast summary; and
- ⊕ Sector involvement, i.e. a summary of engagements with the wine sector such as workshops and seminars.

The progress report is a very comprehensive and systematic document. It makes excellent use of a traffic-light format in the program health summary, schedule, key performance indicator (KPI) and risk sections, allowing rapid identification of areas of delay or high risk. It provides explanations of departures from the schedule, budget or performance against KPIs. The risk sections describe the identified risks, controls, inherent and residual risk ratings and commentary.

The progress report is distributed primarily to the Delivery Committee but is also shared with all Wine Australia staff via its weekly wrap. There is also a status update to the Board which is largely an executive summary of the progress report.

## 2.5 KEY DOCUMENTS

### 2.5.1 FUNDING AGREEMENTS

AGWA and the Commonwealth (represented by DAWR) entered into a grant agreement on 5 January 2017 for phase 1 of the Package, the development of the business plan. The agreement was varied on 26 April 2017. The deed of variation made seven changes to the original agreement, the principal one being to allow for activities additional to the development of the business plan, between the completion of the plan in April, and December. These activities included recruitment of a project team for phase 2 implementation. Thus, the extension served as a transition to the phase 2 project.

The grant agreement between AGWA and the Commonwealth, to implement the business plan for the ERWSP developed under phase 1, was executed on 20 June 2017. This agreement covered only the first two programs of the business plan, i.e. 'Accelerating growth in international demand' and 'Creating China-ready businesses'.

The phase 2 agreement was varied by deed on 11 December 2017. The variation essentially added programs 3 ('Capturing growth in wine regions') and 4 ('Transforming cider businesses') to the agreement and increased the total funding by \$10.5m to \$38.83m (ex-GST).

## 2.5.2 BUSINESS PLAN

The 'Regional Wine Export and Tourism Support Package: Stage 1 business plan – transforming the industry' (prepared by ACIL Allen Consulting) was the principal output of phase 1 of the Package.

The business plan establishes the program structure of phase 2 of the Package and provides the investment rationale, including the outcomes of economic impact modelling of programs 1 and 2. Sensitivity analysis was also applied. The costs and benefits of programs 3 and 4 were not assessed, presumably because they were expected to be much smaller than those of programs 1 and 2.

The business plan outlines the delivery, resourcing and governance models and provides a high-level risk management strategy. The plan also identifies ten key performance indicators (KPIs), noting that these are subject to finalisation of the monitoring and evaluation framework. An implementation schedule is also included.

## 2.5.3 ANNUAL OPERATING PLANS

Wine Australia has produced an AOP for each year of phase 2 of the ERWSP to date (2017–18 and 2018–19). Both AOPs are well-structured, detailed documents that present:

- ✦ A snapshot of Package highlights;
- ✦ An overview of the Package (aims, programs and governance);
- ✦ A description of each of the programs, including strategic context, program outcomes, the three-year budget forecast and activities / budgets for the relevant year, with extensive additional detail on program 1 activities in an appendix;
- ✦ The annual budget and forecast for the whole Package;
- ✦ Performance evaluation; and
- ✦ Governance.

Like all of Wine Australia's corporate documents, the ERWSP AOPs are well laid out with excellent use of colours and imagery, making them very easy to read.

## 2.5.4 OTHER DOCUMENTS

A project plan was developed for the first milestone of the phase 2 agreement, delivered in September 2017 and approved in January 2018 by DAWR. The project plan includes an evaluation and reporting framework, stakeholder analysis and engagement plan, communication strategy and risk management plan.

The ERWSP has a specific section in the Wine Australia annual report. An annual report on the Package is also provided to DAWR as part of the milestones. The Package annual report is not made publicly available but the section on the ERWSP in the Wine Australia annual report is thorough.

## 3. PROGRESS BY PROGRAM

### 3.1 PROGRAM 1: ACCELERATING GROWTH IN INTERNATIONAL DEMAND

#### 3.1.1 PROGRESS AGAINST SCOPE

Program 1 is by far the biggest component of the Package, accounting for \$32m of the \$50m total budget.

The program is designed to contribute to both wine export and wine tourism objectives of the Package. It comprises three campaigns:

- ✦ China export market growth;
- ✦ USA export market growth; and
- ✦ International wine tourism growth.

Each of these campaigns involves media activities, key influencer engagement an events and/or trade and consumer education. In China, the strategy is to increase awareness by consumers and availability of fine wines, whilst in the USA the focus is on influencing the wine distribution network in order to regain previously-lost share in the \$US11-25 per bottle (and above) segment. For wine tourism, Wine Australia is co-investing with Tourism Australia to build awareness of and demand for premium Australian wine.

Program 1 was on reported to be on track as at 30 June 2018, with the exception of the augmented and virtual reality (AR/VR) project and deferral of the Aussie Wine Camp to July 2018. Key activities for the financial year were:

- ✦ China Awards;
- ✦ Hong Kong Wine & Dine Festival;
- ✦ China Food & Drinks Fair & Hotel Wine Trade Show;
- ✦ Vinexpo New York;
- ✦ Vinexpo Hong Kong;
- ✦ China Roadshow;
- ✦ Augmented & Virtual Reality;
- ✦ Aussie Wine Week;
- ✦ Australia Decanted;
- ✦ Education Content Development China & USA;
- ✦ Influencer Engagement China & USA;
- ✦ Key Messaging Campaign China & USA; and
- ✦ Tourism Campaign.

There were some minor delays against milestones, but none of these exceeded 30 business days and mostly concerned the submission of post-event or post-campaign reports. A notable exception was the prototype testing of the AR/VR technology, the due date for which was put back six months to December 2018 (although this may not proceed at all). Australia Decanted was delayed by one month to July 2018 'due to venue logistics

and participant availability'. Finalisation of the Barossa module of the education and content development project was also put back two months and the Aussie Wine Camp was moved to July 2018.

### 3.1.2 PROGRESS AGAINST BUDGET

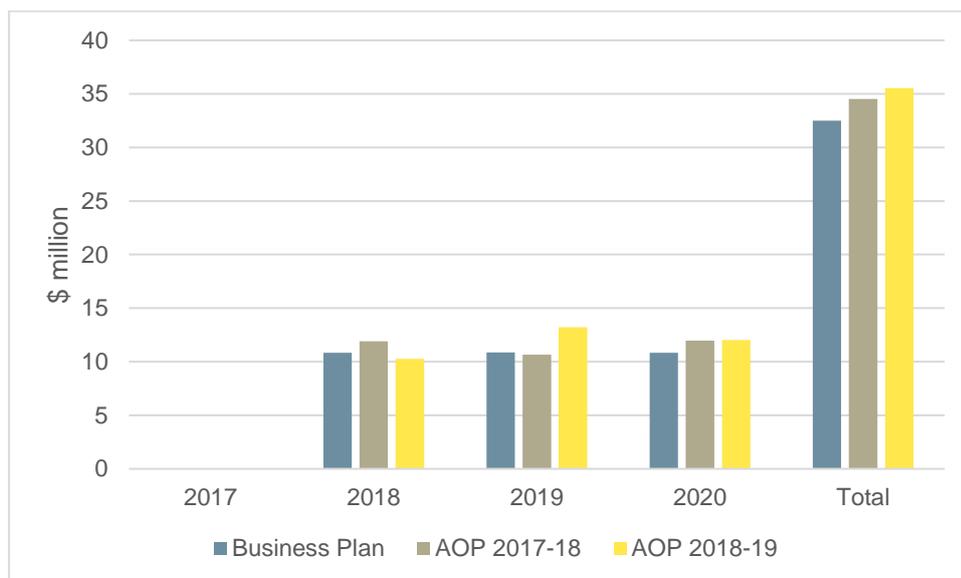


Figure 2: Program 1 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19

Figure 2 (and subsequent corresponding charts) show:

- ✦ The budgets developed in the business plan;
- ✦ The financials as shown in the AOP 2017/18, i.e. actual expenditure for 2016/17 and forecasts for subsequent years; and
- ✦ The financials as shown in the AOP 2018/19, i.e. actual expenditure for 2017/18 and forecasts for subsequent years.

As shown in Figure 2, program 1 was \$1.87m underspent in 2017–18. Savings were evenly distributed across China- (\$620k) and USA-based (\$656k) activities, as well as operational savings (\$125k). The underspend was due mainly to timing of payments, although it also included a \$535k underspend on AR/VR which may be reallocated. Expenditure is forecast to catch up to budget in 2018/19.

### 3.1.3 PROGRESS AGAINST M&E PLAN

Program KPIs are shown in Table 5. As the largest investment of the Package, program 1 has more KPIs than the other programs.

Table 1: Program 1 – progress against KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS*
<b>Outcome – Improved perception of Australian wines in key markets to drive demand and the premium paid</b>				
Media mentions per year	5400	6000	11,869	
Media reach (million people)	800	900	4,554	
Media tone (% positive or neutral)	90	90	94%	
Tier A targets attending a Wine Australian event or visit (%)	50	85	N/A	Tier lists created, waiting for confirmation of attendances
Net promotor score from educators	0	30	76.7	
Buyers attending events who would consider including Australian wine in their portfolio (%)	25	75	98	
Buyers attending events who intend to include Australian wine in their portfolio after one year (%)	10	50	67	
Buyers who attended events who increased the number of Australian wines in their portfolio (%)	10	50	N/A	Will be measured one year after events (interim figure of 67% from surveys)
Quality perception ratings of Australian wine in USA (scores from Wine Intelligence brand health study)	8.13	8.5	8.14 (2018)	
Quality perception ratings of Australian wine in China (scores from Wine Intelligence brand health study)	8.26	8.5	8.32 (2018)	
Trade/consumer perception of Australian wine (scores pre- vs post-event)	8 (pre)	9 (post)	8.87	

\* In these tables, green indicates that the KPI has already been met or is currently being met. Orange indicates that the KPI has not yet been met but appears on track to be met. Where there is no colour, the KPI is yet to be assessed.

As Table 1 shows, performance against KPIs has been very strong in measures relating to media mentions, reach and tone, and in those reflecting the perceptions and intentions of attendees at Australian wine events. Quality perception ratings are showing positive trends, more so where they are measured pre- and post-event, as would be expected. These KPIs have not yet been achieved but are expected to be met by the end of the Package implementation.

### 3.2 PROGRAM 2A: CREATING CHINA-READY BUSINESSES – CAPABILITY BUILDING

(Note that the planning and performance tracking of programs by Wine Australia analyses program 2a separately from 2b and 3, which are grouped together as the two grants programs.)

#### 3.2.1 PROGRESS AGAINST SCOPE

Program 2a involves the design and delivery of a program to upskill regional wine producers, wineries and cider producers for export readiness and the development of wine tourism products and services. The program will include regional education forums and presentations, follow-up support for participants, an online toolkit and resources for exporters and regional tourism operators, and access to detailed market analysis data.

The program is reported in the June 2018 progress report as being on track. However, there was a two-week delay in the engagement of suppliers, arising from the late delivery of an environmental scan and subsequent knock-on effects due to internal resource and assessment panel availability constraints. Both phase 1 and phase 2 suppliers had been engaged by the end of the financial year in line with milestones and 2018–19 milestones were expected to be delivered on schedule.

#### 3.2.2 PROGRESS AGAINST BUDGET

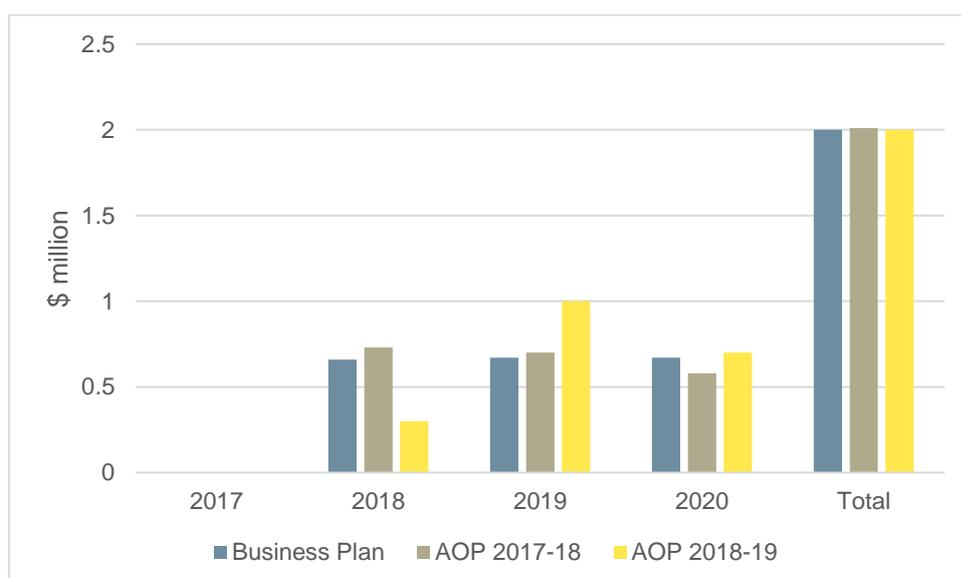


Figure 3: Program 2a financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19

Program 2a was significantly underspent in 2017–18 (\$388k – Figure 3). This was due to the delayed engagement of suppliers described above (\$165,000), lower than expected costs for planning and design (\$151k) and the lack of need for contingency funds (\$65k). The underspend was expected to be corrected by the end of 2018/19.

### 3.2.3 PROGRESS AGAINST M&E PLAN

Program 2a KPIs are shown in Table 2. Progress against KPIs cannot yet be assessed as they do not apply until workshops commence.

Table 2: Program 2a – progress against KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
<b>Program 2a outcome – Improved capability of grape and wine businesses to capture export opportunities</b>				
Grape and wine businesses attending workshops and forums (no.)	0	900	N/A	Program yet to commence
Attendees confirming they have used new capabilities (%)	0	30	N/A	Program yet to commence
Attendees confirming they have accessed the toolkit (%)	0	50	N/A	Program yet to commence
<b>Program 2a outcome – Increased uptake of wine export opportunities by producers</b>				
Producers commencing exports to China or other free trade agreement markets after participating in program by 2019/20 (no.)	0	30	N/A	Program yet to commence

## 3.3 PROGRAM 2B: CREATING CHINA-READY BUSINESSES – WINE EXPORT GRANT SCHEME AND PROGRAM 3: CAPTURING GROWTH IN WINE REGIONS

### 3.3.1 PROGRESS AGAINST SCOPE

As noted above, the AOPs and progress reports group programs 2b and 3 together as ‘grants programs’. Program 2b provides competitive grants for specific export promotion activities to small-medium wine-exporting businesses to capture opportunities specific to the USA and China markets. Total funding is \$1m between 1 January 2018 and 1 May 2020.

Program 3 grants are for international wine tourism and are of two types: state grants and competitive grants. The state grants are available to state wine industry associations according to a pre-determined allocation and are subject to the approval of a business plan by the Expert Assessment Panel (EAP). The competitive grants are available to a range of stakeholders.

During 2017–18, 13 wine export grants were approved and accepted. The South Australia application for the state grants was approved and the New South Wales and Western Australia applications were recommended for approval for funding by the EAP in June. Queensland and Tasmania applications were still in negotiation and Victoria had re-submitted on 29 June. There were 21 successful applications for the competitive international wine tourism grants.

The grants programs were reported to be on schedule as at 30 June 2018. There were some minor delays in the meeting of milestones through the first part of 2018. Program 3 grants opened eight days later than scheduled, due partly to a delay in government approval to release documents. Grant applicants were therefore provided with more time to submit applications in recognition of the effect of the Christmas and New Year break. The milestone for the EAP to provide final recommendations to the delegate, due in October 2018, was expected to be met.

### 3.3.2 PROGRESS AGAINST BUDGET

Budgets and expenditure for programs 2b and 3 are shown in Figure 4.

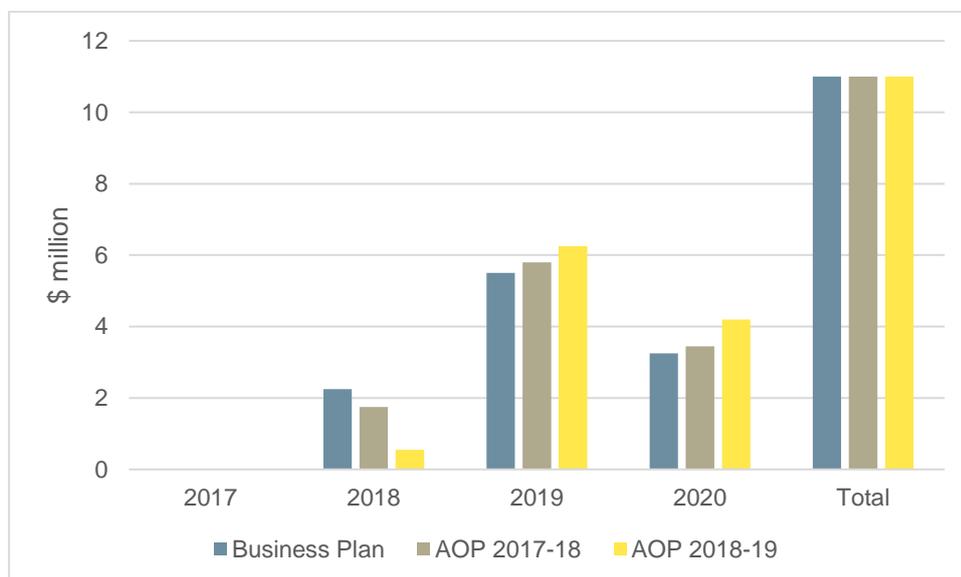


Figure 4: Programs 2b and 3 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19

Program 2b was significantly underspent (\$1.52m) in 2017/18. Export grants were underspent by \$112k due to poor compliance with application guidelines, leading to ‘extraordinarily high clarification rates’ and delays in awarding grants. There was no expenditure in small and medium competitive grants (\$800k and \$750k respectively) due to extension of application of assessment timeframe and undersubscription in round 1. The

first grant for a state-leveraged activity (\$150k) was made, however, in 2017–18 instead of 2018–19 as originally budgeted. This was to South Australia.

### 3.3.3 PROGRESS AGAINST M&E PLAN

Program KPIs are shown in Table 3 and Table 4.

Table 3: Program 2b – progress against KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
<b>Program 2b outcome – Wine export growth</b>				
Increase in collective wine exports by wine export grant recipients (% compound annual growth rate (CAGR) by 2019/20)	Baseline FOB values of recipients	7-8	17	

Note that the June 2018 progress report indicated a ‘green’ status for this KPI and stated that ‘Tracking has been set up to monitor this. 7 of the 9 companies approved so far have shipped wine in the last 5 months since January 2018. Compared to the same period last year, these companies have grown collectively by 17%’. Whilst grants did not start to be approved until March / April, the grant scheme provides for retrospective payments, so this is a valid measurement of progress.

Table 4: Program 3 – progress against KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
<b>Outcome – Improved and expanded tourism services, products and experiences for international wine tourism</b>				
Net promoter score of international tourist services, products and experiences (% increase)	To be provided by grant recipients	50 on average across projects	N/A	Grant participants identified and submitting plans and baselines
<b>Outcome – Increased expenditure and visitation by international tourists for the purposes of international wine tourism</b>				
Annual expenditure by international visitors by 2019/20 (\$b)	5.46 (growth without package)	5.63	5.09 (year to Mar 18)	

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
Annual international visitors for purposes of wine tourism by 2019–20 (million)	1.3 (growth without package)	1.34	1.067 (year to Mar 18)	

The second two KPIs for this program (annual expenditure and visitor numbers) are somewhat problematic in respect to timing. Activities under the program have only just commenced, yet there are targets for the 2019–20 year, which will start in just 12 months. The strength of attribution between the actual numbers observed for 2019–20 and the ERWSP will be very low. On the other hand, there is a valid argument that other ERWSP activities (for example, the in-country promotional activities of program 1) will contribute indirectly to the achievement of wine tourism KPIs.

Expenditure and visitor numbers that were being reported at the end of 2017–18 provide no indication of the success or otherwise of program 3, but they are useful in indicating of the gap between the current situation and the target.

### 3.4 PROGRAM 4: TRANSFORMING CIDER BUSINESSES

#### 3.4.1 PROGRESS AGAINST SCOPE

This program involves the analysis of export opportunities, creation of a compelling brand proposition, development of a ‘go-to-market’ strategy and a toolkit including all of the above to assist cider producers to export successfully.

The commencement of this program was contingent upon legislative changes to the *Australian Grape and Wine Authority Act 2013* to support the cider program. These changes received assent slightly in advance of the program’s milestone date of 1 January 2018.

The program was on schedule until March 2018. As at the end of June 2018, however, the program was slightly behind schedule due to a delay in the completion of interviews with key stakeholders by the brand proposition supplier. The original schedule had foreseen that these interviews would take one month but were now expected to take a further month due to challenges of producer availability. Development of a brand story was to be progressed in parallel with the completion of the workshops to ensure completion in October as scheduled.

The program remained well ahead of the business plan schedule.

### 3.4.2 PROGRESS AGAINST BUDGET

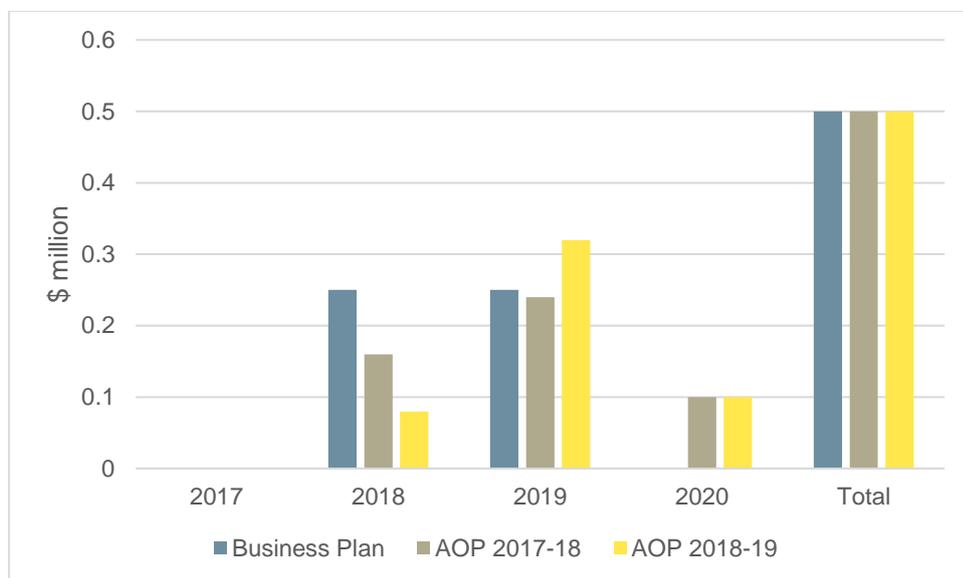


Figure 5: Program 4 financials – business plan vs actuals / forecast in AOP 2017–18 and 2018–19

As shown in Figure 5, actual expenditure on program 4 has been pushed back from the forecasts of the business plan and then the AOP 2017/18. There was an underspend by the end of June 2018 of \$93k, due to a saving of \$96k in the cost of market analysis data.

### 3.4.3 PROGRESS AGAINST M&E PLAN

Program 4 KPIs are shown in Table 5. Progress against KPIs cannot yet be assessed as they do not yet apply.

Table 5: Program 4 – progress against KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
<b>Outcome – Australian cider producers have access to improved information and strategic approaches for accessing export markets, resulting in increased exports</b>				
Cider Australia producers participate in developing, and support, the strategy (%)	0	75	N/A	Reporting data yet to be obtained
Cider producers exporting (no.)	7	20	N/A	Researching data source

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS
Growth in export revenue by 2019-20 (\$m)	16.5	20	18.8 (end Feb 18)	Will use Global Trade Atlas for data, which may change baseline as ACIL Allen used different source – no change to target

### 3.5 WHOLE-OF-PACKAGE

#### 3.5.1 PROGRESS AGAINST BUDGET

Progress against budget for the whole Package is shown in Figure 6.

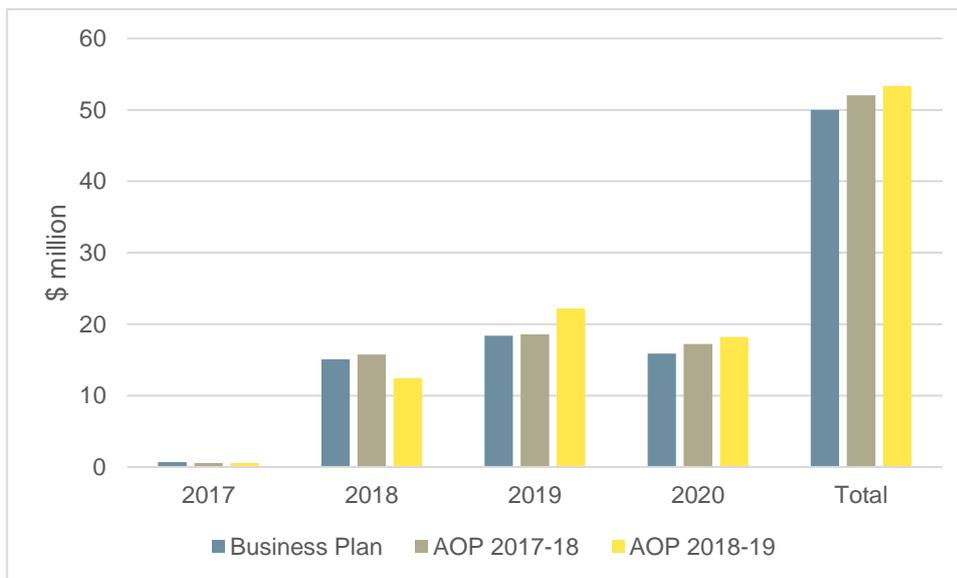


Figure 6: ERWSP financials (all programs) – business plan vs actuals / forecast in AOP 2017–18 and 2018–19

The Package was underspent by \$3.30m against the AOP budget in 2017/18 for reasons described above. The largest underspends were in programs 1 and 2b/3. Expenditure is expected to be caught up during 2018/19. There may be a need for reallocation of funds between programs if this is not the case.

#### 3.5.2 PROGRESS AGAINST M&E PLAN

Table 6 summarises the whole-of-package KPIs and progress towards their achievement as at 30 June 2018.

Table 6: ERWSP – progress against high-level KPIs

KPI	BASELINE	TARGET	CURRENT PROGRESS	STATUS AT JUNE 18
<b>Outcome – Package implementation helps transform the Australian grape and wine sector by showcasing the nation’s wine tourism offering and driving demand for Australia’s wine exports.</b>				
Benefit-cost ratio	N/A	5:1	N/A	
<b>Outcome – Improved demand for Australian wines in key markets</b>				
Growth in value of Australian wine exports by 7-8% CAGR by 2019/20 (\$b total)	2.3	2.8	2.76	
Growth in value of Australian wine exports to USA by 6% CAGR by 2019/20 (\$m total)	464 (US\$348 at 0.75 AUD:USD)	488 (US\$414 at 0.85 AUD:USD)	424	
Growth in value of Australian wine exports to China by 15-17% CAGR by 2019/20 (\$m total)	721 (China – CNY3.71 bn at 5.14 AUD:CNY)	980 (China – CNY5.7 bn at 5.8 AUD:CNY)	1,120	
Growth in Australia’s volume share of the imported wine market in fine wine segment in USA by 2019/20 (% share >=US\$10/ bottle, A\$45/case FOB)	4	6	5	
Growth in Australia’s volume share of the imported wine market in fine wine segment in China (% share >= CNY90/bottle, A\$45/case FOB)	18	21	23	
Increase in average FOB price of Australian bottled wine by 2019/20 (\$)	5.46	5.94	5.94	
<b>Outcome – Higher returns to grape growers</b>				
Increase in national average winegrape price by 2019/20 (\$)	565	590	N/A	Results for 2018 will be available in August

As Table 6 shows, progress towards meeting the overall Package KPIs as at June 2018 was very encouraging except in exports to the USA. 2018/19 targets have already been met for the growth in value of wine exports to and share of the fine wine segment in China, as well as for the average FOB price of Australian bottled wine to all destinations. Growth in overall exports is already close to the 2019/20 target. On the negative side, the total value of exports to the USA was significantly lower than baseline (\$424m vs \$464m) in 2017/18 and eight per cent lower than the previous year<sup>3</sup>. Volume exports to the USA were also down 11 per cent in 2017/18 year-on-year to 161 million litres. Most of the decline is in commercial and value wines, consistent with an overall shift in the market.

There are positive signs for USA exports, though. Australia has gained in volume share of the USA fine wine segment, reflected in an increase in average FOB value of wine to the USA of three per cent to \$2.62 per litre. Leading indicators from program 1 in respect to media mentions, reach and tone, attitudes of influencers and buyers, intention to buy and quality ratings are also positive, although a more proximal indicator, consumer perception of Australian wine as measured by the Wine Intelligence brand health survey, is yet to shift. It should be acknowledged, though, that ERWSP activities in the USA (and indeed in China) are part of a longer-term 'play' to shift consumer sentiment and buying behaviour and it will take time for benefits to be fully realised.

The overarching KPI for the ERWSP is a target benefit-cost ratio (BCR) of 5:1 (that is, \$5 return for every \$1 spent) over five years. The scope of this mid-term evaluation does not allow for a full benefit-cost analysis which, to be done properly, should include careful modelling of the 'counterfactual' scenario (that is, what would have happened in the absence of the investment?). Furthermore, some programs such as the international tourism program have started only recently and will have had little or no impact thus far. It is, however, possible to make some judgement as to whether the results to date indicate that the Package is on track to meet the BCR target.

A major source of the benefits from the Package will come from enhanced value of wine exports, in aggregate and to two key markets: China (including Hong Kong) and the USA. The targets for export income are:

- ⊕ CAGR of 7–8 per cent by 2019/20 in the aggregate value of wine exports;
- ⊕ CAGR of 15–17 per cent by 2019/20 in the value of wine exports to China/Hong Kong; and
- ⊕ CAGR of 6 per cent by 2019/20 in the value of wine exports to the USA.

To be on track to meet the target BCR of 5:1, Australian wine exports in 2017–18 will need to have met or exceeded the value of exports indicated by applying the target growth rates to the 2016–17 levels. Table 7 shows the target value of exports by destination, the actual level of exports and the difference between the actual and target.

---

<sup>3</sup> Additional data in this section is from the Wine Australia Export report – Year ended September 2018

Table 7: Performance to date against key export targets

EXPORTS	TARGET*	ACTUAL	DIFFERENCE
China/Hong Kong (\$m)	986	1,060	74
USA (\$m)	484	423	-61
All destinations (\$m)	2,623	2,706	83

\* Target based on growth from 2016/17 levels: 7.5 per cent for total exports, 16 per cent for exports to China/Hong Kong and 6 per cent for the USA.

As Table 7 shows, actual value of exports was ahead of target for both China/Hong Kong and the aggregate but was behind target for the USA. More to the point – as the export programs are specifically targeted at China/Hong Kong and the USA – the total value of exports to these two regions was \$13 million ahead of the target. As the export targets were set to achieve the BCR of 5:1 and the combined actual exports to China/Hong Kong and the USA and the total exports have exceeded the target, then the review team concludes that the program is on track to meet the BCR target.

There are, of course, factors outside the ERWSP which will significantly influence the exports of Australian wine. One factor is the exchange rate. When the plan was developed in 2017 the Australian dollar was trading at \$0.75 to \$0.77 USD and 5.1 to 5.2 CNY. As at 14 November 2018, the Australian dollar was at \$0.72 USD and 5 CNY. This will have helped demand for Australian wine as it has lowered the price in US\$ and CNY. Currency movements for Australia's major competitors also need to be allowed for when considering the performance of Australian wine exports in the key markets.

Economic growth and consumer confidence will also affect demand. For example, both economic growth and consumer confidence in China have waned in the past 12 months, which could dampen demand for discretionary consumer products such as imported wine. In contrast, economic growth in the US has lifted significantly since 2017 and consumer confidence is at the highest levels since 2000. These and other factors need to be taken into account when conducting a benefit cost analysis of the ERWSP.

The other source of economic benefits in the business plan, additional to wine exports, is the lift in international tourist expenditure in wine regions in Australia. The ERWSP target is for total expenditure of \$5.63 billion by 2019–20. For the year to March 2018, total expenditure was just \$5.09 billion, so expenditure will have to lift by around \$540 million for the target to be met. As noted above, though, the ERWSP activities specifically designed to increase wine tourism have only just commenced. More time and further data are required before a firm judgment can be made on the contribution of this source of benefit to the BCR target.

## 4. CONCLUSIONS AND RECOMMENDATIONS

### 4.1 KEY FINDINGS

#### 4.1.1 PROGRESS AGAINST SCOPE

The Package is on track for delivery against the workplan.

There has been some slippage against milestones and budget, notably in programs 1 and 2b/3. This slippage is expected to be caught up during 2018/19.

#### 4.1.2 PROGRESS AGAINST M&E PLAN

KPIs for programs 1 and 2b have either been met ahead of the target date or appear to be on track for achievement by 2019/20 as planned. The possible exception is the quality perception rating of Australian wine in the USA as measured by the Wine Intelligence brand health study. Related to this, the main concern for achievement of the Package-level KPIs is growth in USA export value. Progress towards achievement of KPIs is not yet measurable for programs 2a, 3 and 4.

On the strength of export values, the Package appears to be on track to meet or exceed its overarching KPI of a 5:1 BCR. However, many external factors will affect the actual BCR achieved. Growth or otherwise in tourism expenditure will also affect the final BCR. Changes in this measure attributable to the ERWSP are not yet available.

#### 4.1.3 OTHER OBSERVATIONS

The ERWSP is very tightly managed by Wine Australia. Strong governance and delivery structures and processes have been established and these appear to be working effectively. Monitoring, evaluation and reporting is comprehensive and risk is managed systematically.

### 4.2 RECOMMENDED ADAPTIVE MANAGEMENT ACTIONS

No adaptive management actions are recommended beyond those that have already been identified.

## APPENDIX 1: DOCUMENTS REVIEWED

The following documents were reviewed for the mid-term evaluation:

- ✦ ERWSP monthly progress reports, November 2017 – September 2018
- ✦ ERWSP annual progress report 2017/18
- ✦ ERWSP Stage 1: Business Plan (ACIL Allen 2017)
- ✦ ERWSP Annual Operating Plan 2017–18
- ✦ ERWSP Delivery Committee fortnightly meeting minutes, 31 July 2017 – 26 September 2018
- ✦ Commonwealth Grant Agreement, 5 January 2017 [for Phase 1 of the Package]
- ✦ Commonwealth Grant Agreement Deed of Variation, 26 April 2017
- ✦ Commonwealth Grant Agreement, 20 June 2017 [for Phase 2 of the Package]
- ✦ Commonwealth Grant Agreement Deed of Variation, 11 December 2017
- ✦ Australian Grape and Wine Authority Annual Report 2016–17
- ✦ Wine Australia Annual Operational Plan 2017–18
- ✦ Wine Australia Strategic Plan 2015–20
- ✦ Wine Australia Export Report 1 July 2017 to 30 June 2018

## APPENDIX 2: MEMBERSHIP OF ERWSP GOVERNANCE GROUPS

### PHASE 1 STEERING GROUP MEMBERS

- ✦ Sandy Clark, WFA President
- ✦ Brian Walsh, Wine Australia Chair
- ✦ Tony Battaglione, WFA CEO
- ✦ Andrew Weeks, Australian Vignerons CEO
- ✦ Andreas Clark, Wine Australia CEO
- ✦ Bruce Hampton, Wine Australia Project Manager
- ✦ Kate Harvey, Wine Australia GM Corporate Affairs and Strategy
- ✦ Steven Weinert, Wine Australia GM Corporate Services
- ✦ Stuart Barclay, Wine Australia GM Marketing
- ✦ JP van Moort, ACIL Allen Project director

### PHASE 1 REFERENCE GROUP MEMBERS

Members:

- ✦ Sandy Clark, WFA President (Chair)
- ✦ Andrew Kay, WFA nominee
- ✦ Angus Barnes, NSW Wine Industry Association nominee
- ✦ Bill Moularadellis, WFA nominee
- ✦ Brian Walsh, Wine Australia Board representative
- ✦ Colin Bell, Australian Vignerons nominee
- ✦ David Dearie, Wine Australia Board representative
- ✦ Ed Peter, Wine Australia Board representative
- ✦ Eliza Brown, Wine Australia Board representative
- ✦ Georgia Lennon, WFA nominee
- ✦ Guy Taylor, Wine Tasmania nominee
- ✦ Ivanka Moularadellis, South Australian Wine Industry Association nominee
- ✦ Jo Grainger, DAWR
- ✦ John O'Sullivan, Managing Director, Tourism Australia
- ✦ Libby Nutt, WFA nominee
- ✦ Nikki Palun, Wine Victoria nominee
- ✦ Redmond Sweeney, WFA and Wines of Western Australia nominee

- ⊕ Rod Hill, Queensland Wine Industry Association nominee
- ⊕ Rodney Harrex, Chief Executive, South Australian Tourism Commission
- ⊕ Sally Cope, Ultimate Winery Experiences
- ⊕ Simon Morton, WFA nominee
- ⊕ Simon West, Australian Vignerons nominee
- ⊕ Simone Furlong, Leeuwin Estate

Observers:

- ⊕ Tony Battaglione, CEO WFA
- ⊕ Andrew Weeks, CEO Australian Vignerons
- ⊕ Andreas Clark, CEO Wine Australia
- ⊕ Stuart Barclay, General Manager, Marketing Wine Australia
- ⊕ Steven Weinert, General Manager, Corporate Services Wine Australia
- ⊕ Kate Harvey, General Manager, Corporate Affairs and Strategy Wine Australia
- ⊕ Bruce Hampton, Project Manager Wine Australia
- ⊕ Jan Paul van Moort, ACIL Allen Consulting
- ⊕ Ray Garrard, ACIL Allen Consulting
- ⊕ Alexandra Lobb, ACIL Allen Consulting

## MARKETING ADVISORY GROUP

- ⊕ Andrew Stark, General Manager Marketing and Category ANZP, Accolade Wines
- ⊕ Libby Nutt, Global Marketing and Export Sales Manager, Casella Family Brands
- ⊕ Simon West, Managing Director, Fullglass Management
- ⊕ Bill Moularadellis, Managing Director, Kingston Estate Wines
- ⊕ Simone Furlong, Joint Chief Executive, Leeuwin Estate
- ⊕ Darryn Hakof, Strategy and New Business Director, Pernod Ricard Australia
- ⊕ Mitchell Taylor, Managing Director, Taylors Wines
- ⊕ Simon Marton, Chief Marketing Officer, Treasury Wine Estates
- ⊕ Nick Waterman, Managing Director, Yalumba Family Vignerons

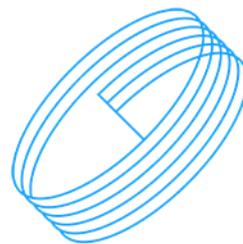
## EXPERT ASSESSMENT PANEL

- ⊕ Andrew McEvoy (Chair)
- ⊕ Howard Cearnis
- ⊕ Sally Cope
- ⊕ Simon Currant AM
- ⊕ Michael East.

Observer: Jo Grainger, DAWR

### **CIDER COMMITTEE**

- ✦ Steven Weinert, Program Owner, General Manager Corporate Services, Wine Australia
- ✦ Tony Battaglione, Chief Executive, WFA
- ✦ Sam Reid, President, Cider Australia
- ✦ Jane Anderson, Executive Officer, Cider Australia



**FORESTHILL**  
CONSULTING