

HEARD IT THROUGH THE GRAPEVINE: HOW PROMOTION CAN CHANGE  
PERCEPTIONS OF TEXAS HILL COUNTRY GRAPES

by

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## Abstract

Texans often do not view the wine grown in their own state as very good—at least compared to the competition. Due to this perception, there is a lot of room for growth in the Texas wine market. This report will explore the current strategies of wineries through social media, websites, and advertising, in addition to analyzing a survey to see how Texans really feel about their own red wine. With the survey conducted, we can discover the root of consumers' distaste for Texas wine and improve marketing strategies. This data is then used to create a strategic promotional suggestion in hopes to change the perception of Texas red wines. Texans often have pride in their locally grown products, but this report reveals that is not always true for wine. Changing the perception through promotion will assist the wine industry in reaching a larger audience and, in turn, create more money for innovation in the industry. The focus of the promotional plan is on Hill Country red wine specifically. The paper proves how much room for improvement there is in the marketing efforts of these wineries in addition to suggesting certain techniques to add. Education and experience are the focus of these efforts.

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## Forward

The wine industry has always amazed me. Through conversations with professionals ranging from the restaurant industry, wineries both big and small, chambers of commerce, and marketing professionals, my eyes have opened to the amount of effort and number of specialists that go into the wine bottle sitting on one's dinner table.

The purpose of this research paper is to help Texas wineries in their pursuit to improve perception among Texans. The findings contained in this report are based on an evaluation of their current efforts and a survey of 45 participants across the state of Texas. Though wineries are struggling with climate changes, pests, employment, and an ever-evolving process, my intention is to help wineries carve out a place in the Texas wine market. With technology evolving, right alongside is the importance of digital marketing. This is a relatively new space but has recently increased to surpass conventional promotional methods in advertising spending. I believe that with the correct strategy, the Texas Hill Country can elevate their brand to Texans everywhere and, eventually, other states.

## Texas Wine Economy

Texas Wine pumps several billion dollars into the Texas economy each year, 13.1 billion dollars to be exact (*Texas Wine and Grape Growers Association, 2017*). Of course, this is from all over Texas, with the Hill Country region providing the second biggest contribution following the High Plains. Texas has 758 acres of land dedicated to vines. Because Texas produces 67% red wine compared to white, I have chosen to focus on red wine. Fredericksburg has been proclaimed the second-best wine trail in the U.S. only to Napa Valley (Butler, 2014). While they do get tourists from across the nation, the majority comes from Texans. Despite this, the complications that Hill Country

wineries face should not be undermined. With 58 different soil types, mold, and disease being a constant worry for vineyards, it is amazing how well they have managed to keep up. Despite the growth that the Texas Wine industry has experienced, economic challenges make it difficult to compete with the low prices of California. Grapes in Texas cost \$1,625 per ton compared to just \$831 per ton of California grapes (Brezosky, 2019). This makes the economies of scale harder and more necessary for Texans to achieve by expanding their market. To further examine what perception problems may exist among Texans, we formulated a survey in hopes of helping the Texas wine industry.

## Survey Methods and Demographics

The survey contained 45 questions that were voluntarily filled out by 53 participants of varying demographics ( $M_{\text{age}} = 45.5$ ; 69.4% female;  $M_{\text{income}} = \$70,000$ - $\$79,000$ ; see Figure 1). Eight participants were excluded from the analysis based on time spent on the survey (minimum of 3 minutes), at least 50% completion, and relevant answers. The survey started with questions about the participants' wine habits, such as where they buy, average priced bottle, and more. These questions can be viewed in the appendix. The main portion of the survey was comprised of various pictures of wine bottles coupled with questions about their impression of it and followed by an open-ended 'why' question. The survey concluded with demographics and questions to discover participant's Texas wine-specific opinions and perceptions.

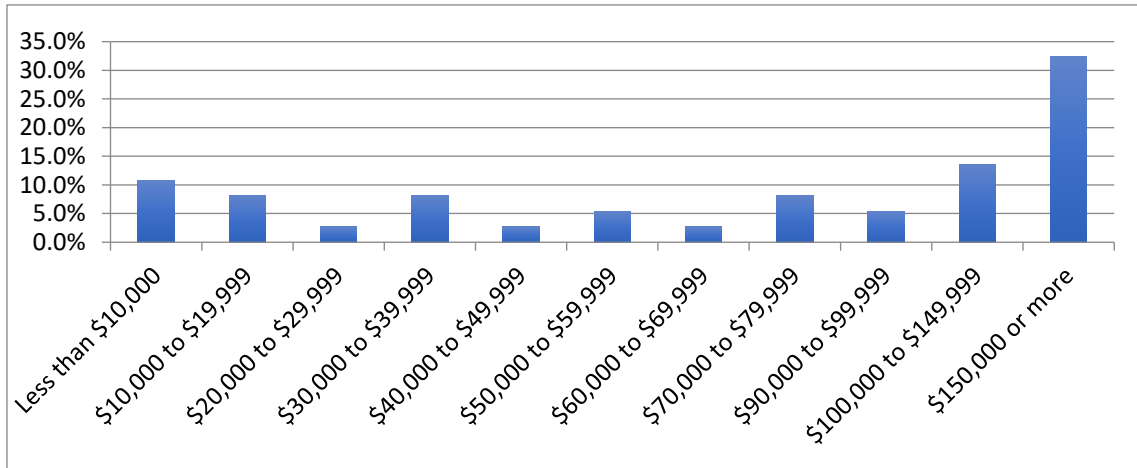


Figure 1

## Results

The results and analysis of the survey are broken down into the basic questions followed by the wine photo-specific questions and trends, and lastly by the Texas-specific answers.

### Basic questions

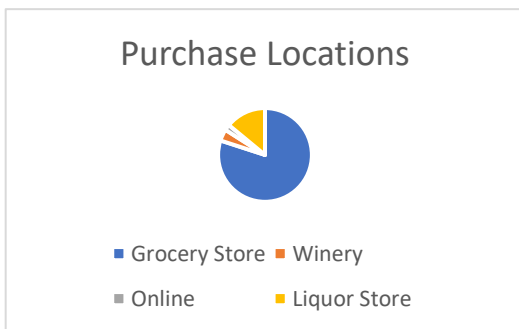


Figure 2

There are more ways than ever to purchase your favorite wine: grocery store, liquor store, winery, or even online shops. More importantly, there are more places to reach your audience. Overall, the grocery category far outshined any other-- regardless of income. 80% of respondents selected 'Grocery Store' as their most regular

means to purchase wine. As far as the other options, liquor store was chosen by those

above a \$90,000 income meaning a liquor store would be a good place to sell higher dollar wines.

Asking participants what they base their wine purchases on resulted in another valuable baseline. While they used year, region, grape type, and labels to determine the price they thought wine was worth in the next section, that may not be what they use when purchasing their wine. Lots of wineries have the philosophy of 'give it a try, then you'll love it.' That is certainly confirmed from this question. 62% of people said that they base their purchases of wine on experience and having tried it previously. What does this mean? Wine tastings pay off. One winery in Texas attends Specs on a regular basis to provide samples of their wine, and it helps tremendously ("Texas Wine," 2018). They are noted as one of the highest selling wines Specs has, despite the higher price point. Price point is the next most likely basis of wine purchases. Regardless of age, price point was mentioned as a consideration. Grape, region, and other had statistically low responses in comparison.

### Based on the Pictures

Participants were shown 5 different pictures of wine followed by the same set of questions. Through this process, my intention was to discover what wine drinkers consider when judging a wine bottle. While there were comments like, "all I can see is the picture, how am I supposed to know if I would enjoy it?" That is precisely the information one is given in a grocery store. All you can see is the bottle. Online, all you can see is a picture. The way wine presents itself may or may not lend itself to new opportunities. By analyzing each wine step by step, we can uncover the dos and don'ts of wine branding.



## Wine 1: Three Dudes Cabernet

Overall, this wine was perceived poorly. Only 42% of people said they at least somewhat agree they would purchase the wine, the lowest out of all five options. People who expressed knowledge of the privately owned winery estimated a higher dollar amount for purchase. Most people, however, said something like “Three dudes does not convey a ‘classy’ feeling,” or commented on the label like “goofy label,” or “label looks cheap.” The primary take-away from this discovery should be that most people want their wine to convey something classy—even if they are simply drinking it after a long day at work. Wine itself should be classy and while segmenting a different target market (wine drinkers who want a discount wine) may be effective, you must have the price and the strategy to reflect that position. Most Americans purchase wine under \$15 (O’Leary). This wine goes for \$18.50 reflecting a separate strategy than previously listed. As for our participants guessing the price of wine, the median price was \$10 with an average of \$10.80. Consumers expect the label and name to assist them in pricing the bottle whether they were able to recognize that or not. This can be confirmed when they are then asked to estimate what the winery sells it for. The median guess was \$14 while the average was \$15.10. From these numbers it can be concluded that most participants feel the wine is slightly overpriced. Participants used the label to determine their thoughts, and it shows how important a label can be for a winery. The label looks cheap due to the font choice, which does not suggest a serious attitude towards a product people admire. Because of this lack in prestige, participants deduced the price would be offset. While it was one of the cheapest bottles shown, it is nearly impossible to create a discount Texas wine that can be competitive with the bulk and low prices of California (Brezosky, 2019). The price leadership strategy would be a tough one to achieve in a



market where you are not competing against other Texas wines, but wines from around the world (e.g. in the grocery store).

## Wine 2: Napa Valley Cabernet

An overwhelming 79.5% of participants said they at least somewhat agreed they would purchase this wine. The picture has no background, the bottle is dark, and the label contains the coveted text: Napa Valley. Although participants were split on where they feel the best wine comes from, Napa Valley has proven to be a comfortable choice. The median price participants said they would pay was \$19 with an average of \$27.90. These prices are more on par with what participants expected the price to be with a median of \$24 and an average of \$39.10. Certainly, there was an overwhelming jump in price compared to the previous wine shown. As far as why the participants chose these responses, there were 16 mentions of the respected region (California or Napa Valley) and 8 mentions of prior knowledge and experience. The biggest stand out, however, was the label with 21 mentions. Almost half of all respondents said the label gave them the impression they had. Most of them followed that up with positive responses. This bottle retails for \$80-\$100, and some people with prior experience noted that is why they would not purchase the bottle. Takeaways from this bottle should include region and label importance. While it was compared to the first bottle, allowing participants to comment on this one as “better” or “more” than the last one, people responded better to this one overall. The label conveys a serious tone. The region is not something a winery can change. However, they should be proud of it. If all Texas wines demonstrate their product by region, people will soon learn to appreciate that region (once they have had a



good experience). There is more on how to do this later, but this study of a well-known region has proved valuable in that people notice. Now we must make them notice Texas.

### Wine 3: Flat Creek Tempranillo

Flat Creek makes wines in the High Plains, but they have an arguably good reputation as far as Texas wines are concerned. The main test of this wine was to explore the reaction to Tempranillo. Tempranillo is a popular red wine grown in Texas climates. Of course, Texas has different soils than Spain, but the conditions fair well for this red. The problem I hoped to test was grape recognition: How is it, and how much does that matter? This label also conveys more color and art than a traditional label. Exactly 2/3 of participants said they at least somewhat agree they would consider purchasing the wine. The label, grape type, and region were the most frequently mentioned items. There were 13 pro-label comments and 2 against. For the most part, even people who said they like the label suggested it should have more information on it. While it intrigued them enough to want to try it because of the uniqueness and art, it did not necessarily come across as the 'best' label to everyone. As for the grape type, Tempranillo, three people expressed dislike towards it and six people expressed love for it. Only two people explicitly mentioned not knowing about the grape. To me, this was surprising. Other participants likely based their knowledge on what they did know (label, region etc.). Of the Texas mentions, 6 people mentioned they liked the Texas region, and it further persuaded them to think positively about the wine. However, 2 people explicitly said they did not think the wine would taste good because it was in a Texas region. Takeaways from this wine study should include the region elevation requirement, again. Equally as important, one should look at the grape variety. In order to truly elevate Texas wine, this will be important. While Tempranillo is more known to the public than I had predicted, it has not hit mainstream. Lastly, one must



ensure that one's label has the information prospective consumers look for such as the year made, grape variety, region, and name.

### Wine 5: Lynch Bages Grand Cru Classe Pauillac

This wine threw a curve ball at the participants. While I had anticipated exploring how high-end wine was rated, many participants admittedly thought it was a Texas or generic wine trying to be fancy. The bottle was in French, as you can see from the title. It is a historic bottle valued at \$200. The median price participants said they would pay was \$17 with an average of \$29. The median expected price was \$25 with an average of \$40.60. Three participants had comments about it looking like its pretending to be fancy, while three people said they did not know anything about the wine variety or type. The rest were aware of the brand, region, or went based on foreign look to assume it was a higher end wine. One participant even added something I had not yet investigated: The bottle is more descriptive, as required by French law. The description is what many people use to help them decide purchases. Regardless, each bottle should have the year, name, region, and varietal. Also, participants expect effort and class to be put into the label despite what they are willing to pay. Even if a winery decides to use a cost-leadership strategy, the label should have the necessary information easily visible.



## Survey Says: Texas Wine Needs Help

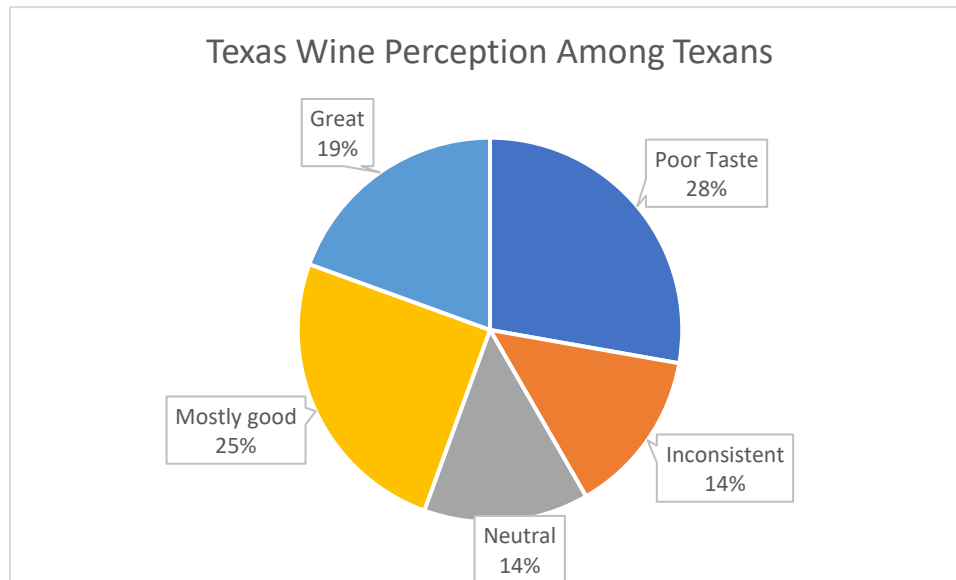


Figure 3

One of the last portions of the survey consisted of Texas-specific wine perception questions. The answers were varied to say the least. To think there is not a perception problem with Texans themselves would be a mistake. Often wineries try to frame the problem as reaching outside of Texas. However, the results speak for themselves: Texans need more faith in their own wine. From there, it is likely other states will follow. Texas pride was mentioned in numerous responses such as "Texas is the best, so our wine is the best." When more people have this mentality, word will spread. The problem, as one participant put it, is that "The stuff in grocery stores is generally not good at all which reinforces the idea that all Texas wines are bad." There may be some merit to this. Going to your local H.E.B. will warrant mostly sweet reds even though only 15% of participants selected sweet as their preferred type of red wine. Three of those people that selected sweet also selected 'may or may not' or 'probably not' when asked if they generally enjoy red wine. The perception of Texas wine needs promotion first with Texans themselves. Texas needs a wider variety of wine represented in grocery stores.

Outsiders hear about Texan-made goods because Texans *let them know*. If we do not have our state rallied behind the industry, how are we to expect other states to?

### Perception Varies Across Regions

Participants in the survey had vastly different perceptions of Texas wine when broken down into region (*figure 4*). Many wineries may get the impression that Texans from all regions like their wine. Therefore, I do not think many wineries have anticipated the need to promote their wines in North Texas, specifically. Central Texans can travel and visit the wineries. North Texans, however, are hours away. Going back to the grocery store theory, there are sweet red wines for Texans to choose at the grocery store. This make sense as to why North Texans have a completely different impression of what Texas wine has to offer. The key to reaching this demographic is generating experience. There is no replacement for direct to consumer samples. With stronger brand recognition, it can be even easier to get opportunities for effective promotion. Moreover, when comparing those that like Texas red wine with those that purchase it in the survey, participants did not regularly purchase Texas wine despite liking the taste. This proves the taste is not necessarily the problem, and campaigns could have a bright future if they became focused on participants that may be more malleable to promotional tactics.

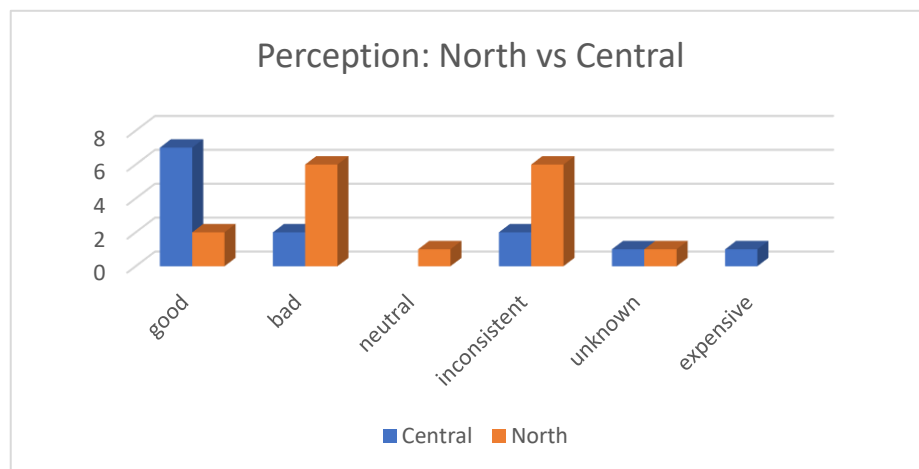


Figure 4

## A Grape by Any Other Name Is Just as Dry

What kind of wine do you drink? People ask this question to their fellow wine drinkers expecting a response like red, white, or perhaps something more complex. If they drink wine regularly, the answer may be Chardonnay, Champagne, Pino Grigio, or Cabernet Sauvignon. These names help consumers scanning the aisle to know what they may like. If they like Cabernet, any of the options will likely be at least decent in taste, regardless of brand. However, grapes like Tempranillo and Syrah may be passed over as “foreign” and “unpredictable.” This is due to the naming discrepancies in the wine industry. Wine grown in the West Coast is named after their grape. If you grow a Pinot Noir in Oregon, it is called the same as a Pinot Noir in California. Across the ocean, wine in Europe is named based on the region it is made in (“How Are Wines Named?”). Each region has their own laws, regulations, and standards for their wine. There is an expectation when you ask for Champagne that the French producers must uphold. This also prohibits any other white sparkling wine from using the name ‘Champagne’. The same is true for varieties of European grapes.

Texas began first began growing grapes for wine a couple hundred years ago. The first settlers that made wine in the United States started in Texas. After prohibition Texas was late to recover while California became the wine empire we know today. Texas tried to compete with the West Coast, but using the same grapes simply warrants little to no luck in our climate. Looking east, however, Texas has the same latitude as Spain (“Texas Wine,” 2018). Enter Texas wine to the playing field, predominantly made with Spanish grapes. Very few consumers understand this though, so it is hard for them to imagine Texas wine being delicious. After all, there are several low-quality Texas wineries that may prevent Texans from trying more Texas wine. Overall, this lack of consumer education likely plays a fairly large role in their decisions to skip over the new “Texas Wine” aisle (“Texas Wine,” 2018). Other industries use a strong campaign to

introduce their product: Instagram and YouTube are just a few among the many platforms new companies use to gain a following and understand the latest offerings. The grape industry continues to develop in Texas despite failing to gain the mass consumer market interested in wine.

### Terroir in America

The public is generally quicker to recognize Pinot Noir than Tempranillo, as proven in a Romanian survey questioning familiarity on grape types (Pavel, 2013). Pinot Noir scored the highest while Tempranillo scored a shocking zero. Another sought after aspect in wines/wineries is the terroir. As ambiguous as the definition may be, terroir attempts to capture the place and ambiance that, in this context, the wine comes from (Tiefenbacher, 2013). Napa Valley has arguably the best terroir reputation in the United States. The more pristine the wine drinker, the more likely they are to focus on the location rather than the brand (Tiefenbacher, 2013). The idea is that a new brand could easily be as successful as an existing one just by publicizing the location (assuming there is a positive perception and reputation of that location). This idea has spread to America since becoming successful in France (Tiefenbacher, 2013). Because of this, regions should work hard to gain place-equity. This is how a territorial wine industry in Texas could truly prosper.

The most successful wines use place-equity to build up their brand-equity (Tiefenbacher, 2013). The wine industry could execute a widespread campaign to elevate perceptions of the Texas Hill Country wine for consumers. Regardless of how, a winery's terroir is an asset. Promoting the terroir will help wineries reach their full potential.



# Heard It Through the Grapevine

## Social Media

After reviewing 10 different Texas wineries' social media accounts, it became clear which kind of social media

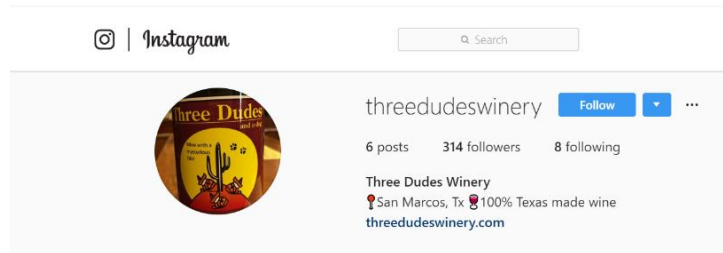


Figure 5 (Three Dudes)

approach makes the biggest impact. First, the importance of a profile picture should not be overlooked. Figure 5 shows Three Dudes Winery's Instagram profile (Three Dudes). The profile image is dark, unclear, cropped oddly, and they have 314 followers. While this might seem like a decent amount for a personal account, most wineries in Texas average around 2,000 followers on Instagram. The profile picture is the first thing users see when they click on your account. If you have gotten them that far, don't lose them by appearing unofficial or unavailable. Using the 10 social media accounts, I've gathered a list of optimal tactics.

- Clear, concise brand as the profile image
- Highest quality pictures of wine (glass or bottled) showcasing location
- Events are advertised and posted about afterwards
- Behind the scenes images (Family, staff, creation, vines) are easily available

While many accounts were effective in their mission to attract followers and brand recognition, there were also some accounts that need improvements. Many of the wineries post graphics far more often than amazing photographs as in Figure 6 (Flat Creek). People attending the wineries attend for the lavish

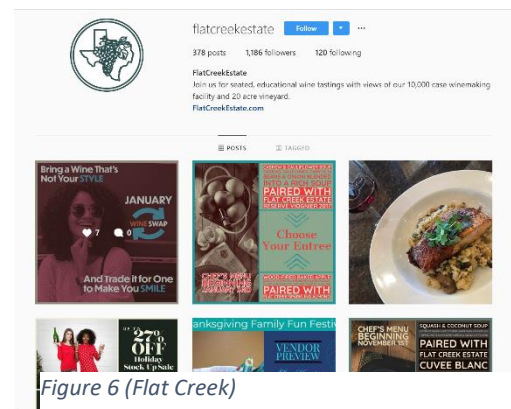


Figure 6 (Flat Creek)

experience, relaxation, and views. They want the *experience*. Posts like this can often be mentally blocked as advertisements, do not engage the followers, and don't allow them to visualize themselves further engaging with your winery/ brand.

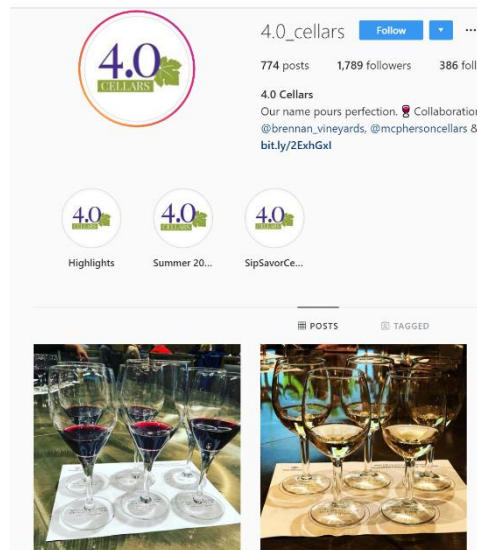


Figure 7 (4.0 Cellars)

Small details are also important when taking the immersive photos. Seen in figure 7, every post of wine glasses contains hardly any wine in each glass (4.0 Cellars). This looks cheap, unfinished (yet begun), and unappealing. You are asking your audience to see the glass as half full when they might see it as half empty. These two posts in figure 7 are explained in the caption: a tasting is taking place, encouraging others to come try.

While this is great, the angles need to be taken into further consideration. Objects look smaller when taken from above, but they look bigger when taken from below (Lyndsie, 2015). Most often, this idea is used when taking photos of people, but the same applies to objects. If you hold a tasting and care to share about it on your page, make sure to take the image from below.

Overall, followers matter. Find out who your audience is. Fatass winery doesn't sound super appealing to the elite wine drinker, but they stand out to a certain audience that may not have another winery they really respond to. They completely own their brand, and in return, they have over 2,000 followers. On the contrary, Three Dudes winery has been on sale for years. Despite the reportedly subpar taste contributing to this lack of success, their branding does not have a strong personality. While wine does heavily depend on people tasting it, recognizing your brand on social media will allow consumers to recall your wine next time they see it on a store shelf. This is the familiarity

effect, which is the tendency for people to prefer things they see more often (Simmonds, 2015). Creating more exposures for your consumers will help them remember and create this familiarity with your brand. Who knows, maybe they will become your next biggest fan. Your social media can encourage and build brand loyalty with your customers as well as promote wine gifting.

## Magazines

Whether placing an ad in *The Wine Enthusiast*, *Texas Monthly* or in a more lifestyle magazine such as *Food and Wine*, wineries have seen value in the print method. Even if you personally are not one to read magazines, you may be surprised to know that *The Wine Enthusiast* has about 250,000 subscribers to their monthly magazine (“Wine Enthusiast Magazine”). *Food and Wine* has about 889,000 subscribers (“Food and Wine”). *Texas Monthly* has almost 276,000 subscribers presumably mostly in Texas (“Texas

Monthly.) For the wine industry trying to reach the comfortable middle to upper class, magazines are a great option. Magazines tend to get passed around as well— meaning that each issue may be read by more than one person (look around your doctor’s office). Magazines may be print media, but they are certainly not dying. One study looked at over 800 wine advertisements in *Wine Spectator* to determine the most effective and common advertisement techniques for wineries. The best advertisements included pictures with the wine bottle, the ambiance (valley, vineyard, process, tasting room), and words that gave the reader an understanding of the brand and class as seen in figure 8 (Tiefenbacher). Mentioning the process, the people and the place involved are all good ideas when writing copy for a magazine advertising. While magazine advertisements



Figure 8

now focus on pictures rather than paragraphs due to our shortened attention span, people often sit down for a while when they read a magazine. You have their attention for longer than you might in a social media post. Really capitalizing on magazine advertisements could prove valuable to the Texas wine industry. *Food and Wine* and *The Wine Enthusiast* even allows you to run advertisements in certain regions of distribution to better target Texans. *Texas Monthly* has a very high pass-along readership rate at 10 readers per copy, so this is also a great option. Placing an advertisement in the lifestyle section could help to reach that Texas-based audience (Texas Monthly). If the goal remains to improve Texans' perception of their own wine, running the advertisements in the Texas region could save money and allow for more frequent exposures and/or creative advertisements.

## Websites

Think about the situation in which your consumer is visiting your website. Likely, they are not seeking new wines. It is possible, but more likely they are searching for a new *location* to try wines. Each winery is competing to give the consumer an *experience*. Personally, I have worked on maintaining, updating, and designing websites for about three years. Because of this, a lot of this analysis comes from a place of personal experience and analytics research. I have seen common mistakes; I have been conditioned to find them. Based on my analysis of 10 different winery websites, I have found ways many of them could improve their sites to encourage visits and engagement. Of course, labeling and branding is a separate issue. If your brand/logo does not look professional or meet what your target market expects, it is not a website problem. This is a branding problem that will consequentially affect your website and bounce rate. For example, Three Dudes winery, as previously mentioned, has their logo and outdated font all over their website, making it look cheap ("Three Dudes"). They are trying to promote their space as a wedding venue, but their branding does not feel like an upscale place.

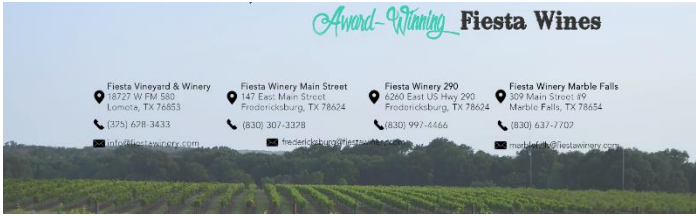


Figure 9 (Fiesta)

In this screenshot (figure 9), simple fixes need to be made to prevent the text from bleeding into the dark portion of the

picture. The contact information is illegible and easily passed over. Simple mistakes like this can make a real impact on the impression your brand has on the reader. Even adding a 50% transparency to a container with a different color can allow the reader to see your words with ease.

Not to single out Fiesta Winery-- they are wildly successful as a Texas Wine distributor—but their website is a great



Figure 10 (Fiesta)

example of the often-overlooked small adjustments that can elevate the brand. This image displays their home page without a menu (Fiesta). Even if your website is only one ‘page,’ you need a menu at the top. This encourages engagement around your site. Even something as simple as clicking “about” and being automatically directed to the correct section. This is the ‘table of contents’ for the winery. From the home page in figure 10, readers have very little incentive to scroll down and explore more. If you already have their attention, it is imperative to keep it for as long as possible. A menu helps them find what they are looking for rather than getting frustrated and leaving.

You may be thinking... so who is doing it right? Not to worry, a lot of wineries have amazing websites to lead the industry.



Figure 11 ("Homepage")



Figure 12 (Monticello)

For example, Signor Vineyards in figure 11 uses parallax scrolling (where the picture stays put as you scroll) of their terroir and a transparent bar to read the menu at the top (Signor). This is pleasing, engaging, and inviting. Compare it to some of the successful Napa Valley wineries like Monticello in figure 12. Showing the terroir through parallax scrolling continues to be a huge theme among the best sites. It is a trend right now among some of the largest companies and industries even outside the wine industry. Parallax scrolling is even an option available on content management systems such as WordPress and Square Space, so you do not need a high-end developer to include this feature on your site.

## Live Tastings

It should come as no shock that if you believe in your product, having someone taste it is one of the best ways to turn them into believers. Texas wines are often more expensive than California wines because of the work and process required to create a quality product. The grapes that will thrive in this region are usually more expensive to buy, and the pest control treatments are more expensive to maintain. Most wine is purchased for under \$15 (O'Leary). I have yet to see a Texas Hill Country winery sell



their bottles at that price point. As a result, Texas wineries must work hard to prove their value as a high-end wine. Texas SouthWind Vineyard and Winery holds demonstrations every weekend, according to Spec's. These demonstrations consist of employees from the winery going to Spec's and offering free samples to their consumers. ("Texas Wine," 2018). Because of this, they can sell their higher priced wine with ease. While the end goal would be to purchase in bulk, leading to a lower grape price, economies of scale will take time to develop. Other wineries like Bending Branch attend popular farmer's markets in San Antonio. Others choose to engage in events and wine festivals such as the Wine Fest in Grapevine, Texas ("Grape Fest"). These are all great options for customer acquisition. Economies of scale will likely be a chicken and egg situation. We must get the public to drink Texas wine for it to become popular enough to buy grapes at a lower cost and in bulk.

### Promotional Tools Summary

At the end of the day, a website, print ad, or social media account cannot make a winery successful. All of this is designed to assist a quality brand to succeed by piquing interest in a cluttered environment. For example, several Napa Valley wines such as Nickel & Nickel have their website design containing the terroir on the home page in a parallax fashion (Nickel & Nickel). Other wines in Napa Valley, however, just slap "Napa Valley" on their bottle and become successful with a less-than-average site and/or little to no social media presence. You should figure out where your target audience is, what your challenges are, and attack the promotional strategy from that point of view. If everyone is surprised how good your wine is in the Hill Country, then these are tactics to elevate the perception and get some of your wine tasted by previously uninformed Texans that have written off all Texas wine from a couple of split corks. Better yet, working together with other successful wineries can increase the efficiency of these tools.

## Industry-Funded Campaigns

Many industries come together to form campaigns. The Texas wine industry does have a few; Texas Wine and Grape Growers Association and Texas Fine Wine work hard, but they could use some further assistance (Schneide, 2019). Other campaigns and industries pool their money to fund promoted campaigns. The *Got Milk?* campaign, for example, included a multitude of promotional materials viewed by all Americans to influence public opinion. Amid the new almond milk trends, the campaign has worked hard to post resources and myths on their highly engaging site. Surprisingly, the creator of this ingenious campaign is the California Milk Processing Board (“About Us.”) California pours lots of money into advertising by coming together as milk farmers. It is not enough to simply manage a social media account. Why would anyone know or view that account unless they were already specifically interested? The key is to promote posts and content that drive viewership to your material. Consider the National Rifle Association (NRA), for example. They spent more than half a million dollars on Facebook advertisements alone in the latest 90-day period (“Facebook Ad Library Report”). Many Americans can agree, whether for or against the NRA values, that their promotions have made an impact on our society. Everyone knows who they are and, for better or worse, the propaganda can sway people’s opinions. The NRA is simply a coalition formed by people with like interests trying to get the word out. Pooling money into a “Super-Pac” of Texas Wineries has the potential to make a real difference. It is not radical, it will not get hearts pounding out of fear or passion, but it will have the ability to make people feel something. Texas pride is difficult to quantify, but with so many great things going for it, Texans are often regarded as the most prideful of their state (Franscell, 2018.) Whether campaigns generate interest, surprise, or pride, Texas wine has many options. Even more relevant, The Wine Institute is the largest public policy advocate for California wineries including more than 550 wineries that attempt to



influence policy, market trends, media, science, and education (Lombardo). Through the support of the wineries, California is now the largest wine producer in America.

## The External Environment

### Opportunities

Wineries in the United States are projected to keep growing in the coming years but at a lower rate. With the changing climates, especially in California, there may be an opportunity for Texas to fill the gap. California continues to experience drier climates and fires. Although Texas has a different and unpredictable climate, we are not subjected to these same circumstances (Lombardo). This may allow producers to access new customers and opportunities.

Another new trend across the states is boxed wine. IBIS admits boxed wine is “still viewed as an inferior product.” For good reason, wineries are trying to change this perception to take advantage of the benefits boxed wine brings. For one thing, it costs less for wineries to package and ship. It is also much more eco-friendly. This trend is really taking off with the general public and could prove a new market and angle. Working to create boxed wine that tastes good at a reasonable price could be an effective strategy worth considering especially for wineries struggling with cost and differentiation (Lombardo). 54% of consumers in a recent survey suggested they would pay more for eco-friendly products. This is certainly a jump from 2011, when only a third of Americans said they would pay more for green products (“Most Americans,” 2019). The trend is expected to increase, leaving a great opportunity for wineries. Canned wines have also made their debut generating \$45 million as of 2018. The trend continues to grow as millennials appreciate the opportunity to buy smaller amounts of quality wine in an environmentally friendly way (Whitten, 2018).

Brand recognition is another opportunity for the Texas wine industry. Many brands are developing better recognition already, but I would not consider it a strength for the Hill Country. Not only are there opportunities for brand recognition in individual wineries, but an opportunity to prove to Texans that Hill Country wine is good wine. “Texas Hill Country” could become a household name and preference with proper promotion.

The idea of shopping local has truly taken over the Texas area. Texans are prideful as it is, but now more than ever there is a focus on shopping local. There are many benefits to this trend including helping your local economy, working with your neighbors, a more memorable and personal shopping experience, and creating a one-of-a-kind neighborhood. The #shoplocal is very popular, proving that many consumers subscribe to this idea. 72% of shoppers in a survey say they are willing to pay more for higher quality products at local shops. This uniqueness is why 61% of participants said they prefer to shop local. What these shoppers also noted was that website improvement for small businesses is the top change asked for (Ratliff, 2016). Creating a unique and personal experience through the website, terroir, and product will further prove that paying more for local products, such as Texas wine, is worth it.

Innovation is beginning to take hold on Texas wine. Texas Tech, Texas A&M, Grayson College, and San Antonio Community College Palo Alto have begun pouring resources into viticulture education (Schneide). As one wine grower pointed out, if you bring a California wine specialist to Texas, they will still have obstacles to overcome. Their climate and science are simply different, so we have begun to grow our own talent right here in Texas. This innovation has the potential to increase the quality of the wine grown in Texas, making direct marketing to the consumer even more promising.

Online Delivery has proved to be a worthwhile investment for wineries. Even small wineries can sell their products through online wine distribution channels such as Winc. Winc delivers wine directly to the consumer's residence allowing them to try new wines conveniently. Winc even partners with small wineries intentionally to help them compete with bigger companies ("Winemaking with Winc"). This opportunity for wineries is immense. Allowing consumers to try the product, assuming they like it, will help with brand recognition and loyalty building.

### Threats

The power of the US dollar is strong. Because of this, it is less expensive for Americans to drink foreign wine. On the other hand, it is more expensive for our wine to be shipped abroad. Thinking about the big picture, this threat of globalization and the economical challenges may influence wineries to begin producing abroad or Americans to begin expecting foreign wine from new entrants such as Australia's Constellation Wine (Lombardo). Grocery stores, as previously discovered, are the main source for many Texans purchasing wines. Because grocery stores can sell wine from all around the world, this threat is persistent and imminent.

Regulations on wine could pose a threat to the industry. Contrary to what many may think, sulfites naturally occur in wine in addition to being added. This threat is applicable to the entire industry including the Hill Country. Sulfites are thought to have caused health problems in some people leading to hives, difficulty breathing, and sneezing. While these may seem minimal, the FDA is monitoring the situation. Red wine actually contains fewer sulfites than white, and any wine contains far fewer than many foods, such as dried fruit (Gorman-McAdams, 2019). To adapt to the public's ideas about sulfites, some wines have gotten out in front of this potential threat by advertising

minimal sulfite-containing wine (Lombardo). If this trend takes off and becomes an expectation from the public, wineries should form a plan to either combat or comply.

Another threat that one should be aware of, especially when considering promotions in the wine industry, are regulations on advertisements. The main concern is the age demographic. Whether wineries choose to use an influencer, social media, magazines, or video, the target market of that effort must be vetted. If an influencer is young and followed by every age, it may not be a wise choice. If a YouTuber's demographic is 18-25, this is not a viable option because the drinking age is 21. Marketing to underage consumers could lead to scrutiny. It may seem like common sense but taking the extra time to do some research could save your winery from a publicity nightmare.

## Bottled Up

The purpose of this research was to assist the Texas wine industry in growing distribution, promotion, and brand recognition ideas and explore the areas of strengths and weaknesses. The key consumer education needs are in the Texas grape varieties and region. Texans grow different types of grapes that many people are not aware of. However, the same grapes are still widely used in Spain, widely regarded as a region with quality wine. Texas may have a tough climate, but there is plenty of evidence that with the right grapes, growth is possible, and experiences can be *beautiful*.

First, we analyzed the survey given to 45 Texans of various demographics to see what they had to say. Overall, the participants were split on the perception of Texas wine, proving the need for further promotion to change their perception. The negative perception increases as the participants' location became further away from central Texas, suggesting that being further from the source directly relates to their perception of the product. Most participants said they most regularly purchase wine from the

grocery store, which has given so many an incomplete impression of Texas wines. Based on the different wines shown, most participants formed opinions based on the label. This further explains how important a label can be for wine (Talbot, 2018). More specifically, participants paid attention to the grape type, style, year, and region on the label. Without this information, participants were uninterested. Regardless of what aspects of the label gave the participants the idea of professionalism, this certainly led to an increase in willingness to pay. There is no greater return on marketing than that focused on your product and packaging. After all, 38% of Americans make their decision to purchase wine based on the attractiveness of the label (Thach, 2015).

Next, we looked at the different strategies currently being implemented either by Texas wineries or other industries. Social Media has power as digital marketing becomes the future of reaching people. With a big return on investment and intricate data at one's disposal, taking advantage of all appropriate social media promotions and accounts is essential. Magazines were next on the list of potential promotional tools. Magazines are a great tool to reach an attentive audience. The data on audiences is strong, and the pass-along readership is a great plus to take into consideration. Moreover, the geographic pinpointing available throughout magazines could be a key advantage. With a smaller budget, wineries can get into the bigger magazines and focus on hitting their key audience. Next, we visited websites. Websites are essential in today's environment. However, it is not enough for them to be informative and available. There is so much more: a responsive design, user experience, and search engine optimization. A website is for people actively searching, and as such, should be cared for. Finally, live tastings are key to direct-to-consumer marketing. Nothing replaces the sampling of wine by potential customers. After all, it was 'experience' that most

participants said their purchases were based on. Other efforts simply push them along the funnel to that ultimate taste that triggers a purchase.

Lastly, after reviewing the information, options, and participants' responses, wineries should consider the environmental impacts and trends on their winery's plan. Whether Texas wineries plan on using an industry-funded campaign method or an individual winery-focused campaign, keeping the opportunities and threats in mind can help their campaign stay relevant in the best way possible.

Overall, wineries should keep this plan in mind when developing a market strategy. By educating, developing brand recognition, and creating experiences, sales will no doubt increase. For an identity, Texas Hill Country wineries should work together to create their own terroir reputation. From there, they can build their own brand identity and carve their own target market.



Figure 13

## Appendix

The questions here are presented in this format:

### #. Question presented

Answer choice available, answer choice available

If no answer choices are presented, there was a text box open for short answer response

1. How much do you pay on average for a bottle of red wine (average night)?
2. Do you generally enjoy red wine?
  - I. Definitely yes, Probably Yes, Might or might not, Probably not, Definitely not
3. Where do you mainly purchase red wine?
  - I. Grocery Store, Liquor Store, Online, Winery
4. What do you base your wine purchases on?
  - I. Experience (Having tried it), Price, Grape Variety, Other, Region
5. What kind of red wine do you prefer?
  - I. Dry, Sweet, Medium, I don't know
6. How often do you drink red wine?
  - I. Never. Special Occasions, several times a week, daily
7. What region of Texas do you live in?
  - I. North Texas, West Texas, Central Texas, East Texas, South Texas

You will be asked to view five different wine bottles and respond accordingly to each of them based on your perception.



8. I would consider purchasing this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
9. I think I would like the taste of this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
10. How much would you pay for this wine? (Numeric values only)
11. What would you expect to be the price of this wine? (Numeric values only)
12. What about this wine has given you these ideas/feelings towards it?



13. I would consider purchasing this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
14. I think I would like the taste of this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
15. How much would you pay for this wine? (Numeric values only)
16. What would you expect to be the price of this wine? (Numeric values only)
17. What about this wine has given you these ideas/feelings towards it?



18. I would consider purchasing this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
19. I think I would like the taste of this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
20. How much would you pay for this wine? (Numeric values only)
21. What would you expect to be the price of this wine? (Numeric values only)
22. What about this wine has given you these ideas/feelings towards it?





23. I would consider purchasing this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
24. I think I would like the taste of this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
25. How much would you pay for this wine? (Numeric values only)
26. What would you expect to be the price of this wine? (Numeric values only)
27. What about this wine has given you these ideas/feelings towards it?



28. I would consider purchasing this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
29. I think I would like the taste of this wine.
  - I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
30. How much would you pay for this wine? (Numeric values only)
31. What would you expect to be the price of this wine? (Numeric values only)
32. What about this wine has given you these ideas/feelings towards it?
33. What is your experience with red wine?
34. What makes red wine "good," in your opinion?

35. Where do you prefer your wine to come from?
36. Where do you think the best wine comes from?
37. What is your perception of Texas wine, and why?  
 Select the appropriate response based upon your feelings for Texas Red Wine.
38. I like red wine from Texas
- I. Like a great deal, like a moderate amount, like a little, neither like nor dislike, dislike a little, dislike a moderate amount, dislike a great deal
39. I regularly purchase red wine from Texas.
- I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
40. I haven't/don't notice where my wine is from
- I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
41. I choose to specifically NOT purchase red wine from Texas.
- I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
42. Red wine from Texas doesn't taste as good to me.
- I. Strongly agree, agree, somewhat agree, neither agree nor disagree, somewhat disagree, disagree, strongly disagree
43. What is your age?
44. How do you identify?
- I. Male, Female, Other/Prefer not to share
45. Information about income is very important to understand. Would you please give your best guess? Please indicate the answer that includes your entire household income in (previous year) before taxes.
- I. Less than \$10,000, \$10,000-\$19,000, \$20,000-\$29,000, \$30,000-\$39,000, \$40,000-\$49,000, \$50,000-\$59,000, \$60,000-\$69,000, \$70,000-\$79,000, \$80,000-\$89,000, \$90,000-\$99,000, \$100,000-\$149,000, \$150,000+

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