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Wineries' Involvement in Promoting Tourism Online: The Case of Texas

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Abstract: Wine tourism has become an important driver of business for wineries in many regions around the world, while Texas wine regions are only starting to emerge as important tourism destinations. A study was conducted to investigate how effectively Texas wineries market tourism to their own establishments as well as in a regional context. A specific focus was placed on indications of collaborative wine tourism marketing practices on winery websites. The results indicate that wineries provide basic visitor information but are missing out on strategic opportunities to market wine tourism to their areas.

Keywords: Wine tourism; Online marketing; Website; Wine region; Collaboration; Wineries; Strategic alliances

Resumen: El turismo del vino se ha convertido en un importante conductor de negocio para muchas bodegas a lo largo de distintas regiones en el mundo, en cambio en las distintas regiones vitivinícolas de Tejas esta empezando a emerger. Este estudio ha sido conducido para investigar y analizar cómo funciona la eficacia de las bodegas de la región de Tejas, sobre sus propias instalaciones, así como en el contexto regional donde operan. Un análisis específico se llevó a cabo sobre las prácticas de colaboración en el marketing turístico del vino en las páginas webs de las mismas. Los resultados indican que las bodegas proporcionan información básica al visitante pero carecen de oportunidades estratégicas sobre el mercado del turismo del vino en sus áreas de operación.

Palabras clave: enoturismo, marketing online, paginas web, región de vinos, colaboración y alianzas estratégicas

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Introduction

Wine tourism has become an important factor for wine regions. In order to receive maximum benefits, wineries must effectively implement and market wine tourism (Wargenau & Che, 2006). Visitations to wineries influence the consumer's perception of wine quality, and wine tourism has been found to enhance the appeal of wines in regions such as Canada, the United States, and Australia (Mitchell & Hall, 2000). Generating secondary economic activity, creating substantial long-term wealth, distribution of the wines at low costs and development of brand equity are all ways in which the winery itself can benefit from wine tourism (O'Neill & Palmer 2004). Yet, there are several challenges associated with wine tourism. The wineries, which normally are agriculture-based industries, must now accommodate tourists and incorporate aspects of a service-based industry into their business (O'Neill & Palmer 2004). O'Neill and Palmer label this transition as going from factory business to customer service, which stresses the move from a production orientation to a market orientation (Jaworski & Ajay, 1993). The success of wine tourism will depend on the visitors' perceptions of services provided by a winery or a wine region. Consequently, it is not only the quality of wine that is important, but also the quality of service being offered (O'Neill & Palmer 2004). Furthermore, effective promotion and marketing is needed to ensure that wine tourism efforts are successful (Veeck, Che & Veeck 2006). Wine tourism could be viewed as a form of agritourism and internet marketing, word of mouth, or a combination of the two methods have been found to be the most effective methods of marketing agritourism (Sharpley & Vass 2006).

While previous research has found wineries to engage in online marketing through the establishment of websites (Stevens & Burns, 2005; Sellitto, 2004; Richardson, 2002; Murphy, 2007; Murphy, Ho & Chan, 2005) no study has gauged the wineries' involvement in promoting wine regions and specific aspects of wine tourism online through their winery websites. Such online wine tourism marketing efforts are

especially important for emerging wine tourism regions such as Texas. Consequently, a study was conducted to analyze the websites of Texas wineries with respect to their overall marketing strategy and specifically their practices to market wine tourism in their region.

BACKGROUND

Texas wine tourism

Research has noted that wine regions across the globe have distinct differences that make direct comparisons between regions difficult and require a thorough understanding of the local circumstances when conducting research (Getz & Brown, 2006). Beames (2003) notes that many of the world's major wine destinations such as the wine regions found in South Africa, California, France, Italy and New Zealand have the necessary coordination, development, and planning for successful wine tourism. The Texas wine industry seems to fall behind these developed wine regions not only in the sheer number of wineries and wine tourists but also in the lack of strategic orientation and coordinated marketing efforts. The Texas wine industry has a very low number of wineries compared to other wine destinations. The Texas wine industry is comprised of only 110 wineries, whereas, for instance, 355 wineries exist in South Africa and about 1465 in Australia (Winetitles, 2002). However, at the same time, the number of wineries has grown tremendously over only the past three years, which indicates increasing potential for wine tourism in Texas. Specifically, in 2001 Texas had only 40 wineries but by 2007 the state had reached its current number of over 100 wineries (Scotch 2004). Also, despite the small number of wineries, wine production is quite high. The United States has over forty wine-producing states, and Texas ranks among the top five in level of wine production (Scotch, 2004).

Yet, several factors seem to negatively influence the development of wine production and related wine tourism in the state. Government plays an important role in the Texas wine industry. In Texas, a winery must be at least 51% owned by a Texan.

This law makes foreign investment a challenge. Additionally, alcohol licensing creates a barrier to the wine industry (Martin & Williams 2003). Texas is divided into 52 dry, 37 wet, and 254 partial counties (Scotch 2004). Currently 95% of the wine produced in Texas is consumed within Texas (Dodd 2006), which suggests a lack of marketing to non-Texan wine drinkers. Research notes that decisions as to where to engage in wine tourism rely on prior knowledge of a wine region and its wines (Getz *et al.* 2008). According to Scotch (2004), wineries feel that the poor perception of Texas wines by the public results in a lack of success of Texas wineries. Indeed Texas tourism is a multi-billion dollar industry; however, wine tourism comprises only a fraction of these dollars. Direct travel spending in Texas is over \$44,431,000,000 while wine tourism-related spending amounts to only \$27,720,000 (Dodd 2006, Dean Runyan Associates 2007). Based on these figures, wine tourism in Texas constitutes only 0.06% of the overall travel spending in the state of Texas (Beames 2003). The lack of awareness of Texan wines outside of the state also impacts the structure of wine tourism in Texas with only 15 percent of wine tourists in Texas being non-residents (Dodd, 1995). According to the Texas travel bureau, travel trends in Texas show that 44% of general tourism within the state comes from non-residents (D.K. Shifflet & Associates, Ltd, 2006). This suggests that marketing efforts by Texas wineries are needed to increase awareness and enhance public perceptions of Texas wines in order to create opportunities for growth in terms of visitation to Texan wineries, especially from out-of-state visitors.

There are also challenges related to the effective promotion of wine tourism to Texas. Other wine regions outside of Texas have flourishing wine tourism due to successful marketing. The case of Italy's wine tourism, especially, demonstrates that it is possible to increase wine tourism through specific marketing programs. Italy only developed wine tourism in 1993 when the Italian Wine Marketing Assistance Program was founded. Within a three-year span, visitors to wineries increased from

400,000 to 2,500,000 (Jaffe and Pasternak, 2004). According to Scotch (2004), Texas wineries recognize the importance of marketing. The Texas Wine Marketing Assistance Program was initiated in 2001 to help boost the wine industry. Yet, the focus of these marketing efforts has been mostly on increasing sales. Indeed, over 66% of wineries saw an increase in sales as a result (Scotch 2004). As far as wine tourism is concerned, Texas faces the difficulty of marketing wine regions that are widely distributed across the state. Unlike other wine regions across the globe, Texas has 8 viticulture areas: Texas High Plains, Texas Hill Country, Bell Mountain, Fredericksburg in the Texas Hill Country, Escondido Valley, Texas Davis Mountains, Texoma, and Mesilla Valley (Dodd 2006). Other entities have fewer regions, for example British Columbia has only four wine regions (Martin and Williams 2003). Distances among wineries and among wine regions can be quite substantial, potentially inhibiting collaboration if not carefully orchestrated. In addition, the Texas wine industry is currently comprised of a few large wineries and a majority of small wineries. About 70% of Texas wine comes from four major players, while the rest of the wineries produce a relatively small amount of wine (Scotch 2004). Smaller wineries have limited funding for marketing. Furthermore, most people in the wine business do not work exclusively for the wine industry; wine business is not their only job. Thus, they typically dedicate fewer resources to the promotion of their winery. A collaborative effort between wineries to promote tourism and to conduct market research is particularly needed in Texas because the majority of wineries are small independent businesses.

Collaborative Wine Tourism Marketing

Wine tourism seems to mostly benefit from agglomerations of wineries in specific regions as tourists need a critical mass of attractions and amenities to be drawn to a destination. Research suggests that to enhance regional wine tourism, wineries in similar geographic locations should collaborate (Wargenau & Che, 2006). Alliances can be both vertical and horizontal. Hori-

zontal alliances refer to the partnerships between local wineries. By working together, wineries can establish strategic partnerships that can create joint marketing and joint production programs (Wargenau & Che 2006). Funding for brochures and magazine advertisements becomes feasible when the wineries pull resources together; whereas, individually, wineries might not have money for advertising or might not have funds to market the winery in general. Joint production allows smaller wineries to benefit from the larger wineries that can lend equipment or share bottle purchases. Most importantly, by working together, wineries can effectively create a wine region which tourists can easily visit. Vertical alliances describe the relationship between multiple partners within different parts of the community and the degree to which they represent the winery. Vertical alliances include partnerships of wineries with tourism councils, tour operators and accommodation providers (Wargenau & Che 2006). Successful wine tourism also depends on the linkage with food (Wargenau & Che 2006; Jaffe & Pasternak 2004). Wineries that pair wine with regional food develop a profitable culinary reputation. Partnerships with local restaurants further exemplify how wineries can market their products while increasing wine tourism to their region. Wineries should be members of local tourism councils and these tourism councils should guide tourists to the wineries. Another way vertical alliances can operate is for hotels or other accommodation providers to offer special discounts to wine tourists; however, smaller wineries typically only establish such alliances through informal means such as word of mouth or flyers (Tefler, 2001). Wang and Fesenmaier (2007) stress that successful destination marketing requires close cooperation and collaboration among and between the various stakeholders at the destination. Thus, both horizontal and vertical alliances are critical to developing wine regions as attractive destinations.

In addition, specific collaborative marketing programs are needed to encourage wine tourism in a region. For example, wine festivals generate reasons to visit a wine region (Yuan et al., 2004). While events can be held at individual wineries,

festivals require collaboration among several entities at the wine destination. Festivals provide not only culinary experiences but also educational experiences and learning about wine is a major motivation for wine tourists (Jaffe & Pasternak 2004). A study evaluating the wine routes in South Africa found that 47% of tourists were motivated to visit the wineries in order to learn about wine and wine making (Bruwer 2003).

Online opportunities for marketing wine tourism

Sellitto (2005) found that websites are instrumental in promoting wine tourism. Wine tourists are well educated, have a higher income and a high interest in wine (Yuan et al. 2004). Internet use among wine tourists is common. Over 50% of US adults use the Internet, which is over 120 million adults, and travelers who use the Internet, or "online travelers", number to 101.3 million adults (TIA 2005). A high majority (79%) of online travelers now use the Internet to gather travel and destination information (TIA 2005). The advancement of the Internet introduces new marketing opportunities for wineries. To take advantage of such opportunities, wineries need to create and maintain a website. The Internet benefits wineries in more ways than just opportunities to market their wines; interaction with intra-industry colleagues, improvement of business images, increased brand awareness, and visitor increases are all benefits of adopting an Internet website (AWF, 2004). Research relating to winery adoption of the Internet in Australia demonstrates that websites are crucial to wine tourism (AWF, 2004).

Furthermore, websites enable online planning and promotion of wine tour itineraries and trails. Sellitto (2004) noted that a main benefit of websites is permission marketing. Permission marketing benefits both the winery and the customer; the wineries build an electronic marketing database while customers receive winery information and special offers about the winery. Similarly, Murphy, Ho and Chan (2005) stress the importance of customer relationship elements such as wine clubs for winery websites. Furthermore, web-

sites increase new wine sales, increased wine sales with existing customers, and allow for customer newsletters and mail order distributions, as well as special wine offers (Sellitto, 2004). Richardson (2002) found that wineries have developed and maintained websites with few difficulties.

He noted that the purpose of adopting a website includes direct sales to customers, promotion and direct marketing, tourism promotion, and indirect marketing. Websites are effective in increasing tourist visitation; over 10% of tourists visited wineries after viewing their website (Richardson, 2002). These visitors use the website to find details and dates of special events. Websites can additionally benefit wineries through the creation of a cyberspace in which tourists may virtually tour the winery before the actual experience (Alpin, 1999). Sellitto (2005) researched the use of websites within Australian wine regions and found that over 90% of the wineries adopted websites. Although wine purchasing is available online, the main function of Australian websites is to provide information (Sellitto, 2005).

Sellitto (2005) notes that winery websites have links to other wineries, which suggests that wineries are in collaboration rather than in competition amongst each other to collectively create a tourism experience. However, no evidence is available with respect to whether collaborative efforts also include other players in the tourism industry such as restaurants, accommodations and destination marketing organizations. In addition, while Richardson (2002) states that visitor information is provided on winery websites, it is not clear how comprehensive this information is and what elements it encompasses. Further, there is currently no research available regarding online marketing efforts of emerging wine regions such as Texas. Thus, a content analysis of Texas winery websites was conducted to investigate how involved Texas wineries are in promoting wine tourism to their own establishments and to the wine region as a whole.

Methodology

Sample

A list of wineries in Texas needed to be generated as the various winery associa-

tions list only their members and no comprehensive list was available for the state of Texas. Using information from the Texas Wine Marketing Assistance Program (TWMAP), the Texas Wine Grape and Growers Association (TWGGA), and the Wine Society of Texas a comprehensive list of bonded wineries was formulated. A total of 110 wineries were identified. Of those, only 98 had an online presence. Several wineries had the same ownership and shared a website while other websites were not accessible, leading to a total sample of 90 winery websites that were analyzed for the purpose of this study.

Analysis

The study involved a content analysis of winery websites. The analysis of the websites looked for key indicators of online marketing practices, and specifically the promotion of tourism on winery websites. Existing research shows that wineries use websites in many ways to promote themselves (AWF, 2004; Sellitto, 2004; Richardson, 2002). In terms of general marketing use, the websites were analyzed regarding use for 1) improvement of the winery image, 2) direct sales to consumers and 3) permission marketing (Table 1). Key indicators for winery image improvement were wine descriptions and listings of awards as well as links to associations. Direct sales to the consumer are indicated by the ability for individuals to purchase wine online through electronic payment on the website and direct shipment. The ability to sign up for a newsletter publication, the ability to be added to a mailing list and the opportunity to join a wine club were used as indicators for permission marketing.

In terms of marketing for the purpose of promoting the winery and the area to tourists, the contents of the websites were analyzed with respect to whether they provided 1) visitor-relevant information about the winery, 2) information about winery events, and 3) information and links to tourism resources in the area. Indicators for visitor-relevant information were maps specifying the winery's location, directions to the winery, opening hours and information about winery tours and wine tasting opportunities. The listing of special events at the

winery served as an indicator of event promotion. Links to accommodation establishments, restaurants, other wineries, events/festivals and destination marketing organizations were used as indicators of the winery's involvement in the promotion of wine tourism in the area.

links to winery associations included on their websites. Direct sales capabilities are offered on more than 33% of the websites. An additional 15% of the wineries promote wine sales to consumers on the website; however, purchases cannot be made online. These websites offer email, fax or telephone orders and many of these wineries make

Table 1. Indicators of Specific Online Marketing Practices

Online Marketing Practice	Key Indicators
<i>General Marketing</i>	
Improvement of winery image	1. Wine descriptions 2. Awards 3. Links to winery associations
Direct sales to customers	1. Online wine purchasing capabilities
Permission marketing	1. Subscription for newsletter 2. Opt-in for mailing list 3. Sign-up for wine club
<i>Marketing of Wine Tourism</i>	
Visitor information	1. Maps 2. Directions 3. Opening hours 4. Tours/tasting information
Event information	1. Events hosted by the winery
Links to tourism resources in the area	1. Links to accommodations 2. Links to restaurants 3. Links to events/festivals in the area 4. Links to destination marketing organizations

Results

General online marketing practices

In regards to wineries promoting a positive image online, most Texas wineries are indeed attempting to portray themselves in the best light. Over 84% of the wineries in the sample included a description of their wines, often presenting images of the specific wines or their labels. Furthermore, almost 47% of the wineries listed awards and accolades of their wines. It could of course be that the rest of the wineries do not have award-winning wines and, thus, cannot post information about awards online. A total of 48 wineries (53%) have

order forms available online to facilitate offline transactions. As far as permission marketing is concerned, only 8 winery websites (9%) allow online visitors to subscribe to an online newsletter while 17 wineries (19%) allow online visitors to join their mailing list. However, 24% of the wineries provide information and application opportunities for their wine clubs. Interestingly, almost 19% of the wineries also promote other products on their websites such as wine glasses, small gift items, food products and clothing/t-shirts.

Marketing of Wine Tourism

A majority of the websites employ all of the key indicators for visitor information. About 90% of the wineries include opening hours and a map of the winery's location while over 83% include directions to the winery on the website. Over 84% of the wineries include information on tours and tastings. Concerning events at the winery itself, about 69% of the websites list winery event information.

Events at the winery includes activities such as food and wine pairings, party rentals, wine workshops, live music and entertainment, and grape stomps. More than 23% of the wineries offer lodging information on their websites and a very small number (4) even promote their own lodging facilities. The latter also provide images and rates of the rooms. More than half of the winery websites with external lodging information present direct links to the websites of these establishments. Except for two instances, all the lodging facilities listed are Bed & Breakfast establishments or local inns. Roughly 20% of the winery websites include information about local restaurants, with most of these de-

Table 2. Results of Indicators of Specific Online Marketing Practices

Online Marketing Practice	Key Indicators	Number of Wineries Utilizing Indicators
General Marketing		
Improvement of winery image	1. Wine descriptions 2. Awards 3. Links to winery associations	1. 76 2. 42 3. 48
Direct sales to customers	1. Online wine purchasing capabilities	1. 30
Permission marketing	1. Subscription for newsletters 2. Opt-in for mailing list 3. Sign-up for wine club	1. 8 2. 15 3. 21
Marketing of Wine Tourism		
Visitor information	1. Maps 2. Directions 3. Opening hours 4. Tours/tasting information	1. 82 2. 75 3. 81 4. 77
Event information	1. Events hosted by the winery	1. 62
Links to tourism resources in the area	1. Links to accommodations 2. Links to restaurants 3. Links to events/festivals in the area 4. Links to destination marketing organizations	1. 12 2. 18 3. 22 4. 16

scriptions including links to the respective restaurant websites. Approximately 24% of the winery websites promote events outside of their wineries. Links to destination marketing organizations are not very common: just over 13% of the websites link to chamber of commerce sites and only 4% include links to local convention & visitor bureaus. Only 12% of Texas winery websites recommend other wineries through one of three methods: hyperlinks to other winery websites, selling other Texas wines, or listing other winery names on their website. Texas wineries almost exclusively recommend wineries that are in the same geographic region. Almost all listings of other wineries include hyperlinks. Further analyses were conducted to investigate whether these links are reciprocated. Only two pairs of wineries include mutual hyperlinks between each of the websites. One winery recommends other wineries through

an interactive map that provides the names of wineries on a local wine trail. As many wine associations also promote wine tourism through events and trails, links to those associations can also be counted as a way to promote wine tourism. As indicated above, over half (68%) of the wineries include hyperlinks to associations.

Discussion

The results confirm findings from previous studies regarding the use of the Internet by wineries in that a large majority of Texas wineries has a website. However, while most have an online presence, some do not even include basic descriptions of their wines. These websites are very simple sites that resemble websites designed in the early stages of Internet use (Hanson, 2000) and offer no or only limited

functionalities and often designs that look very unprofessional. Similar to the findings of Murphy, Ho and Chan (2005), the Texas wineries did not take advantage of online customer relationship building opportunities. Neither newsletter subscriptions and mailing list opt-ins nor wine club applications are widely offered online. Also, the majority of Texas wineries do not take advantage of eCommerce opportunities. Since these general marketing practices create interest in the wineries, they have direct effects on individuals' desire to visit a winery.

A large majority of wineries include the necessary information for a tourist to locate the winery, suggesting that many wineries want visitors to come to the winery. In addition, most seem to organize winery events and promote these on their websites. However, tourism-related information

beyond the winery itself is rather rare, except for wine-related events being held in the community or organized by winery associations. Only some wineries have recognized the natural link to local bed & breakfast accommodations and restaurants and seem to have formed such vertical alliances and promote them actively online. Also, from a wine region perspective, it is important to present one's winery in the context of that region. Horizontal alliances between Texas wineries of a specific region do not seem to be well promoted online. Effective collaboration among wineries provides opportunities for wineries to attract tourists to the winery. Horizontal alliances between wineries allow tourists to access information about nearby wineries. Websites need to have hyperlinks to neighboring wineries to promote wine tourism in the area. Mutual hyperlinks increase website visitation to Texas wineries because hyperlinks guide the online user and create an image of the existence of a critical mass of wine-related resources that warrants a visit to the region. While indirect linkages exist through association websites, these sites list wineries from various regions and, thus, do not create a regional image. The regional context is also not established through links to the respective destination marketing organizations. Clearly, Texas wineries are missing out on important opportunities to entice their website users to actually travel to the area.

Conclusions

The implications for Texas wineries are many. Texas has yet to create a strong image of wine regions in the mind of the consumer. The study results indicate that current online marketing efforts are insufficient in promoting wine regions in the state. Collaboration will very likely increase tourist awareness of regions and their wineries and result in an increase in tourist visitation. Furthermore, boosting visitation results in economic growth for the wineries because tourist visitation and wine sales have a direct correlation. Also, collaboration is especially important for regions like Texas where wineries are small and could greatly benefit from a pooling of their resources, thus saving on online and

offline promotional efforts by avoiding duplication and being able to invest more.

In general, the study results stress the many opportunities for collaborative marketing efforts available through websites. However, although links could be easily established online, creating such connections and partnerships with other wineries and including entities outside of the wine industry in these alliances to effectively promote wine tourism seems to require a collaborative mindset within the region that might not necessarily exist. While some exceptional wineries might have the drawing power to lure in tourists, most wineries rely on a cluster of wineries and tourism attractions as well as amenities to create an attractive wine tourism destination and be able to persuade people to visit. By not providing relevant information for wine tourists on their websites or linking to websites that have the respective information, Texas wineries are not very effective in building capacity for wine tourism in their regions. While most wineries are open to visitors, many seem to be strongly focused on traditional channels to sell their wines. From the results of this study one can conclude that either promoting tourism to their area is not a major priority for Texas wineries, or that Texas wineries have yet to learn how to effectively use websites for the purposes of marketing wine tourism in a regional context.

Using the wineries' websites as the data set results in certain limitations. This study used key indicators to determine the purpose of the wineries' websites, however the wineries' might have a different purpose for developing the websites. Also, collaborative marketing might have been implemented for offline media, although it is very unlikely that these collaborative efforts would not be reflected on the winery websites. Further investigation, such as surveying the wineries, would give more accurate insight as to the reason for developing the websites and the specific marketing goals for the winery and the region.

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