FINAL REPORT

Project Title	**Understanding Consumer Attitudes towards Texas Wines: Building Marketing Strategies**
Funding Agency	**Texas Department of Agriculture**
Grant Recipient	**Texas Tech University** **Texas Wine Marketing Research Institute**
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AN OUTLINE OF THE PROBLEM

Wine production in Texas continues to grow generating $13.1 billion in total economic activity (Wine America, 2017). In terms of sales, it is estimated that approximately 95% of all Texas wine is sold within the state (Texas Wine Marketing Research Institute, 2015). This makes the Texas wine industry largely dependent on local residents' loyalty. The current study aimed to help Texas vintners to better understand their consumer base and to ultimately improve their wine sales.

PROJECT NEED STATEMENT

In Texas, the level of ethnocentrism is higher than in most states. Outsiders commonly view Texans as having large sense of state pride and an old west lifestyle (Schneider, 2007). Johnston, Phelan and Velikova (2015) concurred with this notion suggesting that Texans show admiration for living in the state and preferences for state-produced products. However, despite the strong sense of state identity, when the same study asked about their wine preferences, Texans seemed to favor California wine much more than Texas wine (48.2% versus 15.5%). Therefore, the understanding of why Texas consumers **buy or not buy** local wines becomes of critical importance. The study addressed the need to examine Texas consumer attitudes and perceptions of local wines.

GOALS AND OBJECTIVES

The **overarching goal** of the proposed project was to develop successful and sustainable managerial strategies to better market Texas wine. This key goal was accomplished through **three specific objectives**:

Objective 1: To examine Texas wine consumer behavior, including factors that determine preferences, attitudes, and purchase drivers of local wines.

Objective 2: To explore and assess new trends and the best practices of Texas wineries in selling their wines.

Objective 3: To develop a set of recommendations to better market Texas wines and to disseminate the results of the study to the Texas wine industry.

PROJECT STRUCTURE

To meet the three objectives outlined above, the project was structured in **three-phases**:

Phase I
- Online consumer survey

Phase II
- Interviews with the Texas wine industry professionals

Phase III
- Dissemination of results and recommendations to the Texas wine industry

BENEFITS AND SCOPE

Benefits: Texas wineries and consumers are **primary beneficiaries** of the project. **Other beneficiaries** include state and industry organizations that carry out marketing of Texas wines, such as the Texas Department of Agriculture, the Texas Wine & Grape Growers Association, the Hill Country Wine Association, and others.

Scope: The graph below is a powerful visualization of the growth in the number of Texas wineries - from just 5 wineries in the early 80's when the industry started to experience its rebirth 50 years after the Prohibition to over 400 wineries nowadays. The **outcomes** of the project will assist Texas vintners to better understand their consumers.

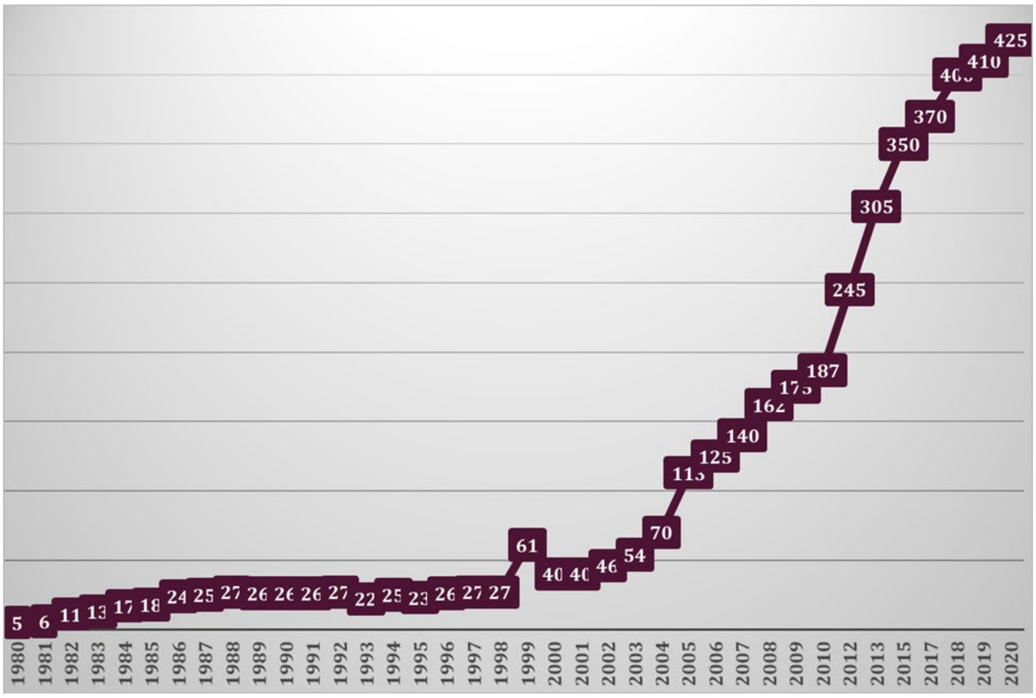


Figure 1. The Growth of Texas Wineries
Source: Texas Wine Marketing Research Institute

METHODOLOGY

To meet **Objectives 1 and 2**, a mixed-method research methodology was employed. For **Phase I**, Texas wine consumers were surveyed through an online survey to examine their consumption behavior, attitudes and perceptions of Texas wines. For **Phase II**, phone and in-person interviews with the Texas wine industry professionals were conducted. The purpose of the interviews was to document changes in consumer attitudes as seen by the industry, and to gather best practices on how to better market to Texas wine consumers.

Phase I Methodology: Consumer Survey

The questionnaire was programmed in Qualtrics – a web-based tool for survey research. The sample was drawn from a panel of Texas consumers provided by a market research company (Dynata). Additionally, the survey link was sent to the funding agency; and the Texas Department of Agriculture distributed the survey to wine consumers in their database. An invitation to participate in the survey was sent to people who voluntarily signed up to receive digital communication from the Texas Department of Agriculture. Through the TDA's database the survey was launched on July, 12, 2021. The market research company launched the survey on July, 21, 2021. Both surveys were closed on August, 2, 2021.

Screening Process

Four screening questions were used to ensure the sample was representative of the targeted population. Respondents were screened out from participation if they were not of the legal drinking age (21+); indicated they do not drink alcoholic beverages, including wine; and/or if they were not Texas residents. The following flowchart depicts the screening process.

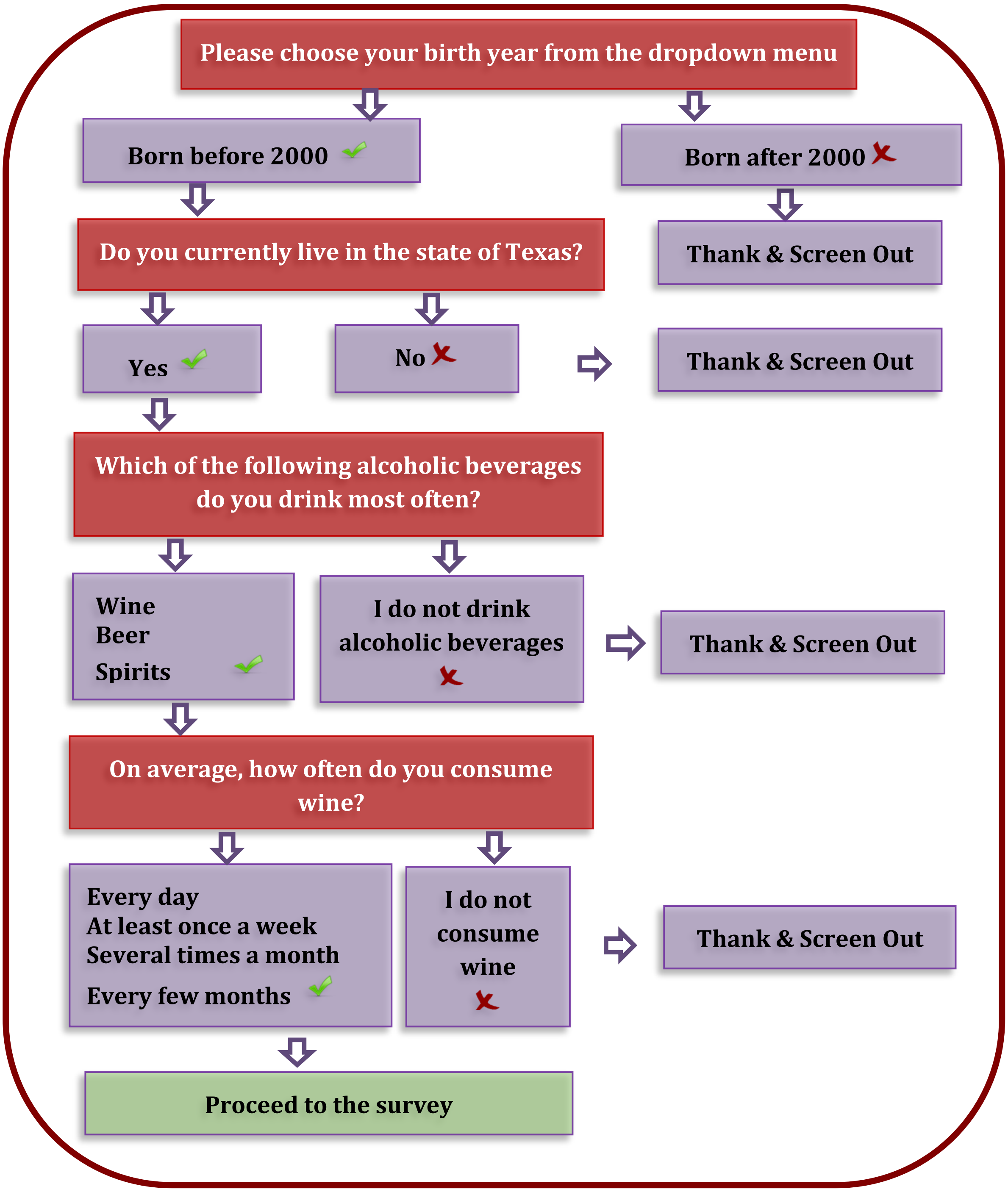


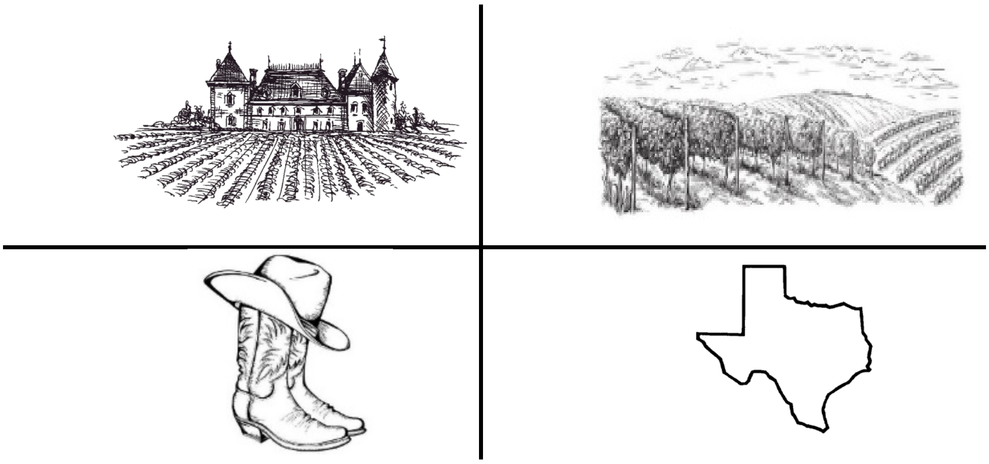
Figure 2. Flowchart of Survey Participants' Screening

Survey

A copy of the survey can be found in **Appendix**. Questions were developed and adapted from previous wine marketing studies. The survey included the following blocks of questions examining various characteristics of Texas wine consumers:

- general alcoholic beverages preferences
- wine consumption and purchasing behavior
- wine tourism behavior
- wine knowledge and involvement
- wine preferences
- attitudes towards Texas wines
- regional brand recognition
- socio-demographic characteristics

The survey also included an embedded experiment with visual shelf simulations of four wine labels. The labels stimuli were designed in collaboration with a professional graphic designer. For consistency, the four images on the labels were presented in the same format - as sketches. Two images represented the traditional visualization of established wine regions (château and vineyard slopes); whereas the other two images represented a non-traditional, emerging wine region – Texas. The two Texas images included instantly recognizable Texas symbols (cowboy boots/hat) and the state of Texas map contours. Otherwise, the four labels were identical. The only difference was in the images.



A set of wine consumption scenarios was listed; and participants were asked to indicate which of the four wines they would choose for each scenario:

- casual meal at home *without* guests
- a gift to friends (novice wine drinkers)
- special meal at home *with* guests
- a gift to expert wine drinkers
- to bring to a host when going on vacation to another state/country

Phase II Methodology: Interviews

Ten in-depth interviews were conducted with the Texas wine professionals during the months of August and September 2021. Convenience sample was used. Several interviews were carried out in-person; however, due to the travel restrictions associated with the pandemic, most interviews were conducted by phone. The interviewees included a combination of Texas wine producers and tasting room employees.

The interviews were semi-structured in nature. No rigorous set of questions was used; rather, the researcher asked only a few predetermined questions, while the rest of the discussion was open, allowing new ideas to be brought up. To ensure that the interviews meet the objectives of the study, the researchers prepared a framework of themes to be explored. A topic guide approach was used to develop the framework. This approach ensured a practical structure for the discussion sequence and facilitated the comparison of the interviews data.

FINDINGS

Phase I Findings: Consumer Survey

Consumer survey data were analyzed using a variety of statistical methods. The analysis was carried out using IBM SPSS Statistics 27 software package. A total of **895 valid usable surveys** were entered into the analysis. The sections that follow present the findings of the analysis.

DEMOGRAPHICS

Gender

The sample demographics was somewhat skewed towards more women. However, this study's sample mirrors the general trend for more female wine drinkers in the U.S. Thus, the sample was considered representative in terms of the gender split.

Table 1: Sample Gender Split

Gender	Frequency	Percent
Males	391	**43.7**
Females	504	**56.3**

Generation Cohorts

Having a representative generation split was important for a balanced sample. Generation cohorts included Matures (born in 1945 and more), Baby Boomers (born 1946 – 1964), Generation X (born 1965 – 1981), Generation Y (born 1981 – 1994), and Generation Z (born 1995 and later). The sample was slightly skewed towards Baby Boomers, but again, this mirrors the larger current U.S. wine market demographics.

Table 2: Sample Generation Cohorts Split

Generation	Percent
Gen Z	4.2
Gen Y	24.7
Gen X	26.1
Baby Boomers	37.5
Matures	7.4

Education Levels

The majority of respondents were well-educated, with over half of the sample (57.4%) stating that they hold a university degree of bachelor's level and higher. Bachelor's degree was the most common, accounting for 35.8%, and master's degree holders came second (19.7%). It must be noted that the sample was well balanced in terms of educational levels. Respondents having high school degrees held a significant share (21%) in the sample as well.

Table 3: Sample Levels of Education

Education	Percent
No formal qualifications	1.5
High school diploma	21.0
Technical / vocational qualifications	15.6
Bachelor's degree	35.8
Master's degree	19.7
PhD	1.9
Other	4.6

Annual Household Incomes

The sample was representative in all ranges of gross annual household incomes. Respondents indicating annual incomes over $140,000 and higher constituted the largest group (20.3%). Almost half of the sample (49.5%) had annual household income of less than $80,000 and was distributed about evenly among different levels.

Table 4: Sample Annual Household Income

Income	Percent
Under $20,000	9.1
$20,001 - $40,000	14.7
$40,001 - $60,000	13.5
$60,001 - $80,000	12.2
$80,001 - $100,000	9.1
$100,001 - $120,000	8.3
$120,001 - $140,000	5.9
$140,001 and more	20.3
Prefer not to respond	6.9

Marital Status

The sample reflected that two-thirds were married or living common law. This is consistent with other studies that show similar marital status representation for wine drinkers.

Table 5: Sample Marital Status

Marital Status	Percent
Single	16.8
Married or living common law	66.9
Separated or divorced	10.3
Widow	5.1
Other	0.3
Prefer not to respond	0.6

Length of Texas residency

The sample mostly included long-term Texas residents, with the vast majority of respondents stating they have lived in Texas for more than 16 years. Slightly over one-third lived in Texas for 16-35 years; and a quarter of respondents indicated the range of 36-50 years. Remarkably, almost a quarter of the sample stated they lived in Texas for over 50 years. Indeed, the sample demonstrates opinions, attitudes, and behaviors of local residents.

Table 6: Texas Residency: Years Living in the State

Years living in Texas	Percent
less than 6 years	8.0
7 - 15 years	9.2
16 - 35 years	**34.0**
36 - 50 years	**25.1**
more than 51 years	**23.7**

ALCOHOLIC BEVERAGES PREFERENCES

This survey targeted wine drinkers, but at the same time it was important to know what other alcoholic beverages consumers drink. Respondents can be largely identified primarily as wine drinkers, with wine preferences accounting for over 60%. Beer was the preferred beverage for a quarter of the sample. Less preferred alcoholic beverages including spirits and ready-to-drink beverages.

Table 7: Preferences for Alcoholic Beverages

Beverage	Frequency	Percent
Wine	542	**60.6**
Beer	223	24.9
Spirits	122	13.6
Ready-to-drink beverages	8	0.9

In cross-comparison gender analysis, female respondents favored wine over other alcoholic beverages to a greater degree than their male counterparts. Close to 70% of women in the sample reported that wine is their preferred and the most often consumed alcoholic beverage. Notably, among male participants, wine was also the primary choice for about half of the men in the sample (49.1%), but beer was the close second choice (37.6%). Preferences for spirits were almost equally split. While ready-to-drink beverages accounted only for a small share, these types of drinks seem to be prevailing among female drinkers.

Table 8: Gender Differences in Alcoholic Beverages Preferences

Gender	Alcoholic Beverages			
	Wine	**Beer**	**Spirits**	**Ready-to-drink**
Males	49.1%	**37.6%**	13.0%	0.3%
Females	**69.4%**	15.1%	14.1%	1.4%

Further, cross-comparison analysis among various age groups showed some notable differences. Although all generational cohorts opted for wine as preferred beverage, Baby Boomers seem to be the most loyal wine drinkers, with 70.8% strongly preferring wine over other alcoholic beverages. Matures came second. Younger generations (especially Gen Z and Gen Y) distinctly showed more preferences for beer. This is likely to be associated with the craft beer trend among the younger consumers. In the spirits category, Gen Y seems to be the group that prefer and consume spirits most often.

Table 9: Generational Differences in Alcoholic Beverages Preferences

Generation	Alcoholic beverages			
	Wine	**Beer**	**Spirits**	**Ready-to-drink**
Gen Z	52.6%	**34.2%**	10.5%	2.6%
Gen Y	51.1%	**32.1%**	16.3%	0.5%
Gen X	56.0%	**29.1%**	12.8%	2.1%
Baby Boomers	**70.8%**	15.8%	12.5%	0.9%
Matures	**60.6%**	24.9%	13.6%	0.9%

WINE CONSUMPTION BEHAVIOR

Wine Consumption Frequency

Over half of participants reported drinking wine several times a week. Clearly, the sample consisted of high-frequency wine drinkers.

Table 10: Wine Consumption Frequency

Frequency	Percent	
Every day	14.1	**52.5%**
Several times a week	38.4	
Several times a month	26.4	
Every couple of months	21.1	

Wine Purchase Outlets

Generally speaking, respondents prefer to purchase wine through traditional distribution channels. Grocery stores are the primary outlets where consumers purchase wines in Texas (29.6%); and liquor/wine shops accounted for 29.2% among all sales channels. It is not surprising that grocery stores surpassed wine shops due to diverse wine choices provided in stores like United and HEB. Significantly, supermarkets contributed 17.8% of total wine purchase outlets in this sample. On the contrary, online channels took up only for small fractions, including winery's websites, online retailers, and online grocery retailers.

Table 11: Wine Purchase Outlets

Retail Outlets	Percent
Supermarkets (e.g., Walmart)	**17.8**
Tasting rooms	9.3
Winery's website	2.8
Grocery store (e.g., United, HEB)	**29.6**
Liquor/wine shop (e.g., Total Wine & More)	**29.2**
Online wine retailer (e.g., wine.com)	2.6
Online grocery retailer (e.g., HEB.com)	1.7
Hypermarkets (e.g., Costco, Sam's Club)	5.3
Other channels	1.9

Average Price Paid for a Bottle of Wine

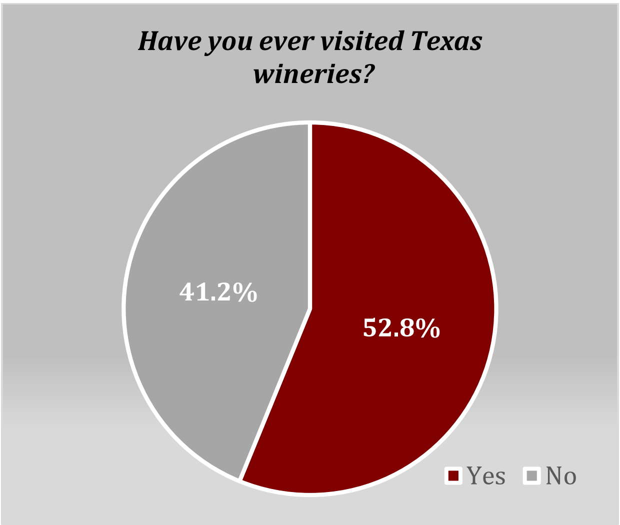
On average, the majority of participants spend less than $20 on a bottle of wine for casual wine consumption at home. The table below indicates two significant groups: one-quarter of the sample spend $10.00 - $14.99 for casual consumption at home; and another ¼ spend $20.00-$29.99. The majority of respondents are still conservative about their spending on casual home consumption of wine. Less than 15% would pay more than $30 for a bottle.

Table 12: Average Price for a Bottle of Wine for Casual Consumption at Home

Average Price per Bottle	Percent	
less than $10.00	**15.0**	
$10.00 - $14.99	**25.3**	**60.4%**
$15.00 - $19.99	**20.1**	
$20.00 - $29.99	25.1	
$30.00 - $49.99	9.6	
more than $50.00	4.9	

WINE TOURISM BEHAVIOR

Wine tourism significantly contributes to the success of the Texas wine industry. Two questions addressed Texas residents' wine tourism behavior. Respondents were asked if they have ever visited Texas wineries and/or a festival involving Texas wines. Over half of the sample stated that they have visited Texas wineries (52.8%); and 45.8% attended a wine festival in Texas. A follow-up question was asked for those who visited Texas wineries: "*Prior* *to the beginning of COVID-19, approximately how many Texas wineries have you visited in a one-year timeframe?*" Two-thirds responded that they visited less than 5 wineries per year.



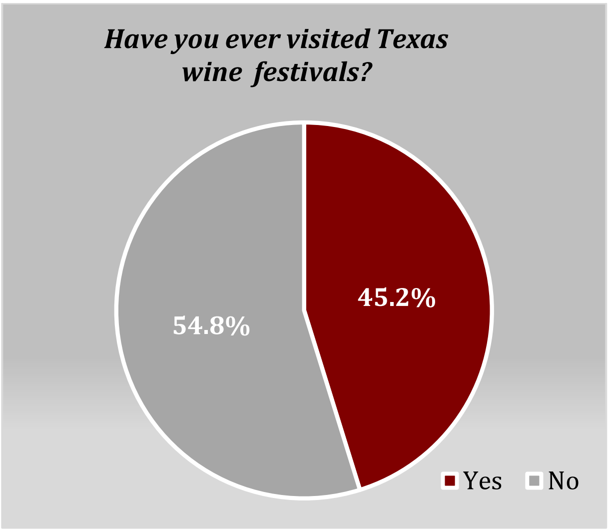


Figure 3. Texas Wineries and Festivals Visitations

Table 13: Average Number of Visited Texas Wineries Per Year

# of Wineries	Percent
less than 5	**66.2**
6 - 10	19.2
11 - 29	9.6
30 - 49	2.8
more than 50	2.1

WINE KNOWLEDGE AND INVOLVEMENT

The sample was further examined in terms of wine knowledge and wine involvement. Participants were asked to assess their own knowledge about wine based on the provided descriptive categories. Over forty percent reported that they have limited wine knowledge. At the same time, over one-thirds indicated they are somewhat knowledge about wine.

Table 14: Self-Reported Levels of Wine Knowledge

Wine Knowledge	Percent
New to wine; know nothing yet	6.7
Know a little about wine	36.7
Somewhat knowledgeable about wine	35.1
Very knowledgeable about wine	17.7
Expert or professional	3.8

Respondents were further asked whether they are members of any wine clubs. The vast majority said they do not belong to wine clubs.

Figure 4. Wine Clubs Memberships

To determine the role that wine plays in consumers' daily lives (wine involvement), respondents were given a set of statements and were asked to indicate their levels of agreement with these statements. The majority of the respondents do not follow wine news or latest wine trends. Nevertheless, almost half of the sample said they like being involved in conversations about wine; and about two-thirds indicated that they have a strong interest in wine and that wine is important to them. Therefore, the sample was substantially involved with wine, but the involvement seems to occur on the intrinsic level (engagement in conversations, interest), whereas extrinsic engagement (following wine news and trends) seems to be of little interest to Texas wine consumers.

Table 15: Wine Involvement

	I follow the latest trends in wine	I like to be engaged in conversations about wine	I have a strong interest in wine	Wine is important to me
Strongly disagree	9.3	4.4	2.5	2.0
Disagree	**24.9**	14.6	9.8	8.7
Neutral	**32.4**	**31.5**	**26.3**	**27.3**
Agree	21.0	**33.4**	**38.2**	**38.1**
Strongly agree	12.4	16.1	23.2	24.0

WINE PREFERENCES

Type of Wine and Level of Sweetness/Dryness

In terms of wine preferences, more than half of the sample rooted for red wines (57.3%), with the absolute advantage. However, when it came to wine styles according to sweetness, of particular interest was the finding that although red wine seems to be the top choicr for the majority, preferences for sweet wines surpassed preferences for dry wines (31.4% vs. 26%).

The overall number of those who do not like dry wines was rather high - almost three-fourths of the sample (when tastes for sweet, semi-sweet, and semi-dry wines are combined.)

Table 16: Wine Types and Styles Preferences

Type of wine	Percent	Level of sweetness	Percent	
Red	**57.3**	Dry	26.0	
White	23.7	Semi-dry	**19.8**	
Rosé / blush	16.1	Sweet	**31.4**	**74%**
Equal preferences	2.9	Semi sweet	**22.8**	

A closer look was taken at the relationship between the type and the sweetness of wine. Not surprisingly, those who favor dry wine also gave an overwhelming preference to red wines. Interestingly though, among those who prefer sweet wines, the majority still indicated that they like red wine.

Table 17: Relationship between Wine Types and Levels of Sweetness

Level of sweetness	Type of wine			
	Red	White	Rosé/Blush	Equal preferences
Dry	81.1%	14.6%	3.0%	1.3%
Sweet	**47.0%**	21.0%	26.3%	5.7%
Semi-dry	**53.1%**	36.2%	8.5%	2.3%
Semi sweet	**48.0%**	27.0%	23.5%	1.5%

Gender differences in wine preferences were found. Two-thirds of men identified red wine as most preferred, whereas only half of women gave preference to red wine. Rosé was clearly not men's favorite. While the split between men and women was almost equal among those who favor dry wine, women indicated more preferences for sweet styles (34.9% vs. 26.9%). Overall, women seem to be more diverse in their wine preferences, while men are more conservative in their tastes for wine.

Table 18: Gender Differences in Types and Styles of Wine

Gender	Type of wine			
	Red	White	Rosé/Blush	Equal preferences
Males	**64.7%**	23.3%	**10.5%**	1.5%
Females	**51.6%**	24.0%	**20.4%**	4.0%
	Level of Sweetness			
	Dry	Sweet	Semi-dry	Semi sweet
Males	25.6%	**26.9%**	22.0%	25.6%
Females	26.4%	**34.9%**	18.1%	20.6%

Looking at the generational split, more than half of the participants in each generation cohort indicated that they like red wines. However, noticeable preferences for rosé and blush wines were seen among younger generations, especially Gen Z and Gen Y. Dry wines are more favored by older generations, whereas younger consumers prefer sweeter wines.

Table 19: Generational Differences in Types of Wine

Generation	**Type of wine**			
	Red	**White**	**Rosé/Blush**	**Equal preferences**
Gen Z	**60.5%**	13.2%	**23.7%**	2.6%
Gen Y	**55.2%**	19.5%	**24.9%**	0.5%
Gen X	**57.7%**	22.6%	16.2%	3.4%
Baby Boomers	**59.2%**	26.2%	10.1%	4.5%
Matures	**51.5%**	34.8%	12.1%	1.5%
	Level of sweetness			
	Dry	**Sweet**	**Semi-dry**	**Semi sweet**
Gen Z	5.3%	**52.6%**	13.2%	28.9%
Gen Y	15.8%	**47.1%**	12.7%	24.4%
Gen X	23.5%	**40.2%**	17.9%	18.4%
Baby Boomers	**36.0%**	16.4%	23.5%	24.1%
Matures	**30.3%**	12.1%	34.8%	22.7%

Factors Affecting Wine Purchasing

Respondents were asked to rank the importance of the factors they consider while purchasing wine. The following chart shows consumer rankings **from most to least important.**

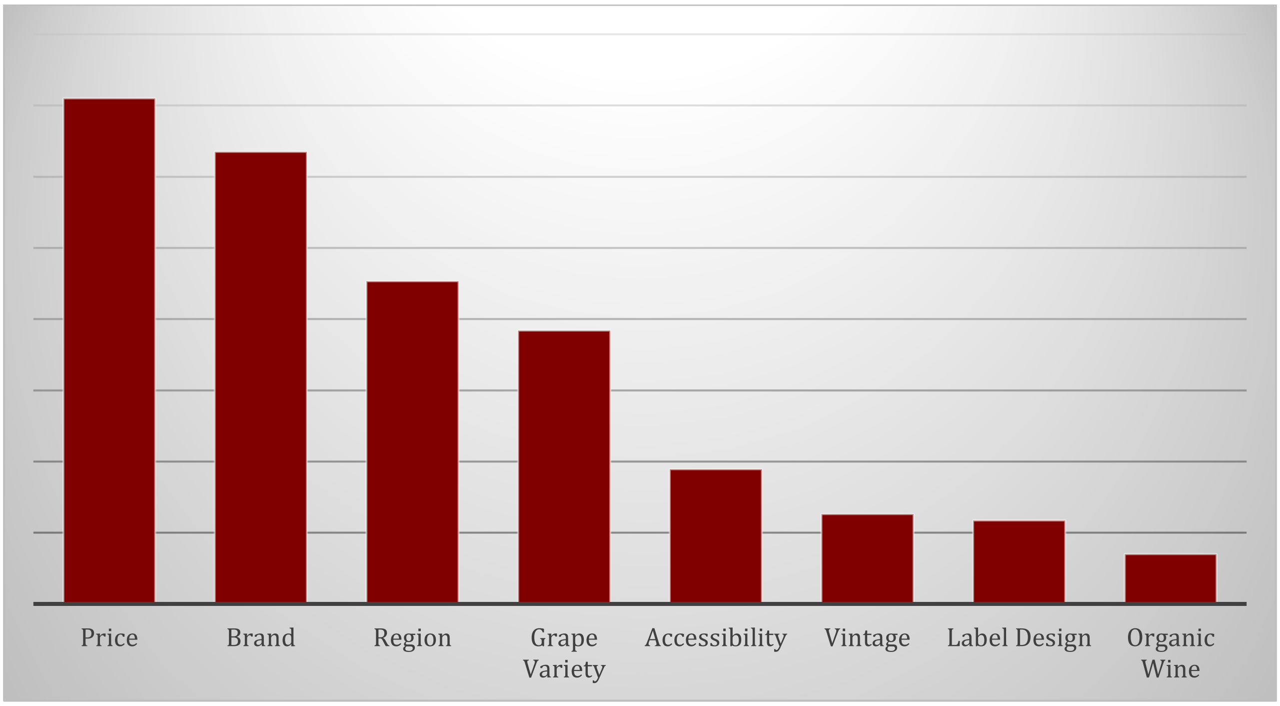


Figure 5. The Importance of Factors for Wine Purchasing

Preferred Wine Regions

Consumers were asked wine from which region they favor most. The sample showed fondness for American wine by reporting that almost 55% of their consumption is domestic wines. California was the most preferred region, with almost a quarter of the sample giving preference to California wines. However, Texas came close second (21.1%). Possible reasons to explain these two regions' success in the market are the enormous volume of wine that California produces and distributed domestically (thus, availability), and Texans' support for products made in the U.S. and particularly in the state of Texas (i.e., consumer ethnocentrism). International regions like Italy, France, and Spain shared decent portions of preferences. These countries export a considerable amount of wine into the U.S. market, thus these wines are relatively easy to acquire and have good reputations among American wine consumers, unlike the wines from lesser popular regions at the bottom of the list, such as Greece, Portugal and South Africa.

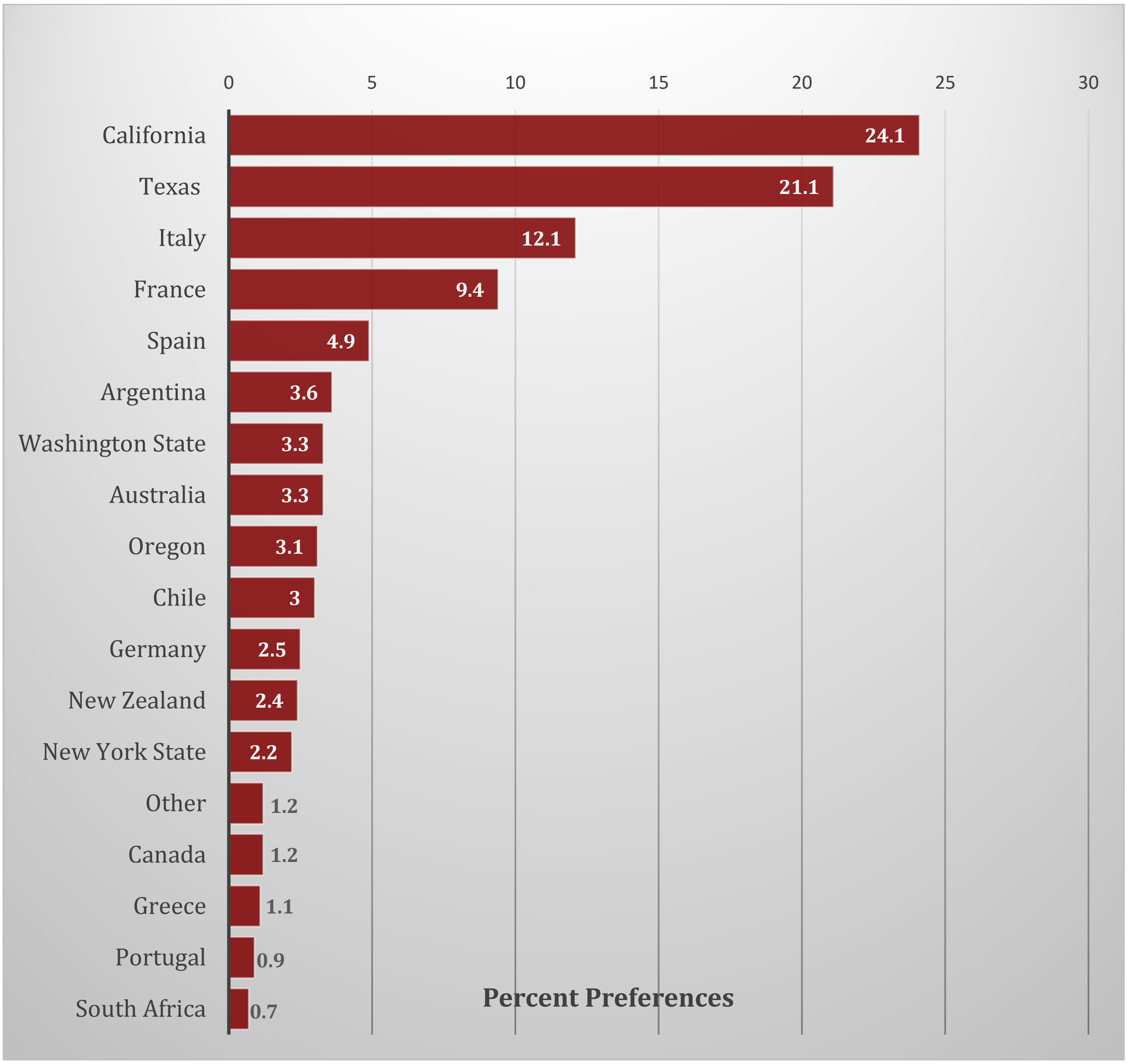


Figure 6. Wine Regions Preferences

ATTITUDES TOWARDS TEXAS WINES

Previous experience with Texas Wines

The vast majority of participants have tried Texas wine in the past, which demonstrates that Texas wine gained recognitions among drinkers in its home state.

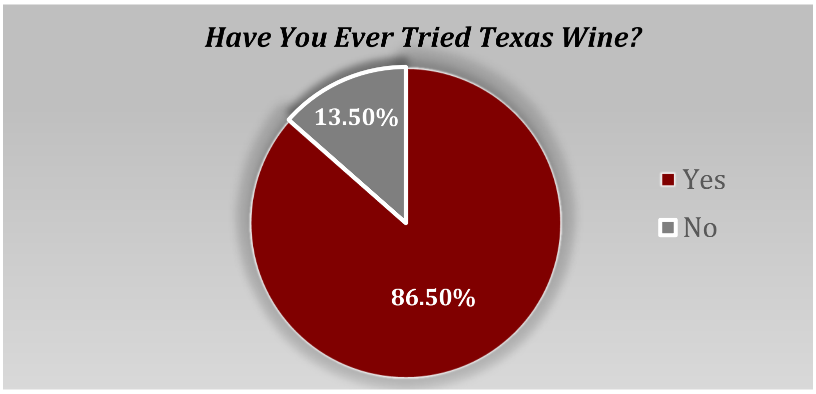


Figure 7. Percent Respondents Who Tried Texas Wine

A follow-up question was asked on how recently they tasted Texas wine. Thirty percent stated they just had a sip last week. Another 20% and 24.2% tasted Texas wine either last month or over a few months ago, respectively. The data is encouraging for Texas wine producers since they have made their names known and continue to appeal to established and potential customers.

Table 20: How Recently Did You Taste Texas Wine?

Frequency	Percent	
Last week	**30.5**	**50.5%**
Last month	**20.0**	
A few months ago	24.2	
About a year ago	12.5	
A few years ago	10.5	
Many years ago	2.3	

Texas Wine Purchase Frequency

When identifying Texas wines purchase frequency, over 30% said they buy Texas wine regularly, at least once a month or more often. One-third stated that they purchase Texas wine every couple of months.

Table 21: Texas Wine Purchase Frequency

Frequency	Percent	
At least once a week or more often	**10.9**	**31.7%**
Several times a month	**20.8**	
Every couple of months	**34.3**	
About once a year or less often	23.0	
Never	10.9	

Share of Texas Wine in Consumer Wine Purchases

To further explore preference for Texas wines, respondents were asked what percentage of the wine they buy is typically Texas wine. Twenty-two percent reported about 5%-10%, which is the most mentioned range. The second close group (20%) reported about 31%-50% of the wine they purchased was Texas wine. Of particular interest to the industry are the 14.1% that indicated that more than 75% of the wine they buy is usually Texas wine. Overall, these findings demonstrate that Texas wines have earned stable support from the local consumer base but has not become their primary choice yet.

Table 22: Share of Texas Wine in Consumer Overall Wine Purchases

Share Range	Percent
less than 5 %	8.7
5% - 10%	**22.2**
11% - 15%	4.3
16% - 25%	14.3
26% - 30%	6.2
31% - 50%	**20.0**
51-74%	10.3
more than 75%	14.1

Perception of Texas Wine Prices

Respondents overwhelmingly hold the opinion that Texas wines are **fairly priced**. Only 14% stated that they thought the wines were overpriced. This sample seem to approve the quality of Texas wines and is willing to pay the price tags that wine producers set. The data reflected that pricing strategies that Texas wineries practice are robust towards the in-state market.

Table 23: Perception of Texas Wine Prices

Price Perceptions	Percent
Very underpriced	0.9
Underpriced	1.7
Fairly priced	**74.7**
Overpriced	13.0
Very overpriced	4.2
Unable to answer	5.5

The next table shows how much people would be willing to pay for a bottle of Texas wine for casual consumption at home. On average, up to 75% of the sample **would spend up to $30 for a bottle of Texas wine**. Notably, this is higher than what these very consumers are willing to spend on a bottle of wine in general (up to $20/bottle, as reported earlier here). The most acceptable price range these consumes are willing to pay for a bottle of Texas wine is $20.00-$29.00, accounting for 27.7% of the responses.

Table 24: Willingness to Pay for a Bottle of Texas Wine

Price ranges	Percent
less than $10.00	10.2
$10.00 - $14.99	18.2
$15.00 - $19.99	21.6
$20.00 - $29.99	**27.7**
$30.00 - $49.99	14.5
more than $50.00	7.8

Willingness to Recommend Texas Wine

The sample overwhelmingly reported their willingness to recommend Texas wine to others, with 41.6% choosing the option of 'likely to recommend' and 39.5% choosing the option of 'extremely likely'. Only 4.9% were reluctant to recommend Texas wines.

Table 25: Willingness to Recommend Texas Wine to Others

Likelihood of Recommendation	Percent	
Extremely unlikely	1.3	
Unlikely	3.6	
Not sure	14.1	
Likely	**41.6**	**81%**
Extremely likely	**39.4**	

Perceptions of Texas wine

The key questions for examining Texas residents' perceptions of local wines revolved around three broad themes: (a) **general attitudes**, including reputation and availability; (b) perceptions of **taste**; and (c) **occasions** for which Texas wines are perceived appropriate.

On a scale 1 to 5, where 1 was '*strongly disagree*' and 5 '*strongly agree'*, participants indicated their levels of agreement with a set of statements about Texas wines. The table below shows the *overall mean scores* for the entire sample on each statement listed **in the descending order**.

The top three statements with the highest scores in each category illustrate that Texans perceive local wines to be of good quality, better than expected, and good value for money. With regards to the overall taste perceptions, Texas wines are seen as easy to drink, diverse in styles, and uniquely different from other regions' wines. Lastly, when asked about occasions for Texas wines, consumers prefer to drink them at home or when dining out at casual restaurants. Importantly, consumers are also willing to give Texas wine as a gift.

Table 26: Mean Values for Perceptions of Texas wine

	Texas wines are…	**Mean***
General Perceptions	Good quality	**3.99**
	Better than expected	**3.98**
	Good value for money	**3.91**
	Appropriately priced	3.78
	Widely available	3.50
	World-class	3.47
	Well-known	3.28
Taste Perceptions	Easy to drink	**4.13**
	Have a lot of different styles	**3.98**
	Uniquely different from other regions	**3.69**
	Complex	3.45
	All taste pretty much the same	2.56
Occasions	Good to drink at home	**4.20**
	Good to give as a gift	**4.18**
	Suitable for casual dining out	**4.13**
	Suitable for special occasions	4.10
	Go well with food	4.10
	Suitable to drink at fine dining restaurants	3.91
	Go better without food	3.30

**Based on a 5-point scale, with anchors of 1 = 'strongly disagree' and 5 = 'strongly agree'*

The next three tables show the percentage of agreement/disagreement on each statement, with the highest number highlighted in bold in each column. The bottom rows sum up only those who 'agreed' and 'strongly agreed' with each statement. These summarized percentages help identify the areas where there is room for improvement for Texas wines: to be better known, more widely available, and to become world-class wines.

Table 27: General Perceptions of Texas wine

	good value for money	**well-known**	**appropriately priced**	**good quality**	**widely available**	**world-class**	**better than expected**
Strongly disagree	2.3%	3.0%	1.2%	0.6%	2.7%	4.1%	0.9%
Disagree	2.1%	20.0%	4.4%	4.5%	14.2%	10.2%	3.2%
Neutral	23.5%	**34.4%**	26.0%	18.5%	30.5%	**37.0%**	23.2%
Agree	**46.6%**	31.1%	**51.7%**	**48.0%**	**35.5%**	31.5%	**42.6%**
Strongly agree	25.5%	11.5%	16.6%	28.4%	17.1%	17.2%	30.1%
Sum of Agree & Strongly agree	**72.1%**	**42.6%**	**68.3%**	**76.4%**	**52.6%**	**48.7%**	**72.7%**

Overwhelmingly, Texans think highly of the taste of Texas wines. They are unique and come in assorted styles. However, the wines are not perceived as complex, rather as easy to drink.

Table 28: Overall Perceptions of Taste of Texas Wine

	easy to drink	complex	have a lot of different styles	all taste pretty much the same	uniquely different from other regions
Strongly disagree	1.0	2.1	0.4	15.5	1.0
Disagree	1.9	11.7	3.5	**44.4**	8.9
Neutral	11.2	**39.2**	20.6	17.2	28.5
Agree	**54.2**	32.8	**48.8**	14.8	**43.2**
Strongly agree	31.6	14.2	26.7	8.1	18.3
Sum of Agree & Strongly agree	**85.8%**	**47.0%**	**75.5%**	**22.9%**	**61.5%**

Consumers strongly believe that Texas wines are suitable for virtually any occasion, with slight resistance towards fine dining. Additionally, fewer people agreed that Texas wines would go well without food.

Table 29: Occasions for Texas Wine Consumption

	good to give as a gift	suitable for special occasions	good to drink at home	suitable for casual dining out	suitable to drink at fine dining	go well with food	go better without food
Strongly disagree	1.7	1.3	1.0	0.8	2.8	0.7	2.8
Disagree	2.5	3.6	1.3	2.8	6.1	2.5	16.6
Neutral	10.3	12.8	11.3	12.7	20.8	15.9	**42.3**
Agree	**46.9**	**47.8**	**49.5**	**49.7**	**37.8**	**48.3**	24.0
Strongly agree	38.7	34.4	36.9	34.0	32.5	32.7	14.2
Sum of Agree & Strongly agree	**85.6%**	**82.2%**	**86.4%**	**83.7%**	**70.3%**	**81.0%**	**38.2%**

It is important to note that all participants answered the questions regarding Texas wines, including those who indicated they never tried them. The logic behind including everyone was that even though some consumers may not have tried Texas wines (hopefully, not yet), they live in the state, and thus, may have some image of local wines. For the industry, it is equally important to know what users and non-users think of their product.

Noticeable differences were found between those people who have tasted Texas wines before and those who have not. Not surprisingly, those who were unfamiliar with the wines thought they were not well-known and not widely available.

The role of wine tourism on the attitudes towards Texas wines was also substantial. People who have visited Texas wineries and/or festivals ranked Texas wines higher on all three parameters: higher general perceptions; good quality (even higher scores on wines' complexity); and suitable for all occasions.

Generational differences were found on the three aspects of perceptions and attitudes. In the table below, averages scores on perceptions among different generational cohorts are shown. In each column, the two highest values are highlighted in bold. As evident from the table, younger generations mean values are significantly different from older generations on virtually every dimension. Baby Boomers and Matures seem to have quite similar views on Texas wines, but those views are not as favorable as opinions of younger consumers. **Younger consumers – and particularly Gen Y – have much better perceptions of Texas wines than older generations.**

Table 30. Generational Differences in Mean Values for Perceptions of Texas wine

	good value for money	well-known	appropriately priced	good quality	widely available	world-class	better than expected
Gen Z	3.71	**3.55**	3.82	3.76	**3.84**	3.58	3.74
Gen Y	**4.00**	**3.59**	**3.90**	**4.04**	**3.67**	**3.61**	**4.00**
Gen X	**4.04**	3.51	**3.96**	**4.19**	3.61	**3.73**	**4.20**
Baby Boomers	3.79	2.97	3.61	3.87	3.31	3.27	3.86
Matures	3.83	2.85	3.62	3.86	3.33	3.11	3.82

	easy to drink	complex	have a lot of different styles	all taste pretty much the same	uniquely different from other regions
Gen Z	3.93	**3.55**	3.83	**3.10**	**3.93**
Gen Y	**4.23**	**3.64**	**4.03**	**3.03**	**3.94**
Gen X	**4.27**	3.54	**4.12**	2.70	3.91
Baby Boomers	4.03	3.32	3.90	2.20	3.47
Matures	3.98	3.22	3.83	2.17	3.19

	good to give as a gift	suitable for special occasions	good to drink at home	suitable for casual dining out	suitable to drink at fine dining	go well with food	go better without food
Gen Z	3.92	4.11	4.05	3.84	3.74	4.03	3.26
Gen Y	**4.26**	**4.17**	**4.21**	**4.16**	**4.00**	**4.13**	**3.51**
Gen X	**4.37**	**4.27**	**4.30**	**4.30**	**4.15**	**4.19**	**3.42**
Baby Boomers	4.07	3.98	4.18	4.07	3.75	4.06	3.15
Matures	4.02	3.89	3.95	3.94	3.67	3.94	2.98

**Based on a 5-point scale, with anchors of 1 = 'strongly disagree' and 5 = 'strongly agree'*

No substantial differences were found between attitudes of males and females. Although the examination of the average scores revealed that women view Texas wines slightly more favorably, the differences were not large enough to account for statistical significance.

REGIONAL BRAND RECOGNITION

A series of questions tested regional brand recognition. It should be comforting for Texas wine marketers to see that over 60% of the sample had seen or heard advertising about Texas wine.

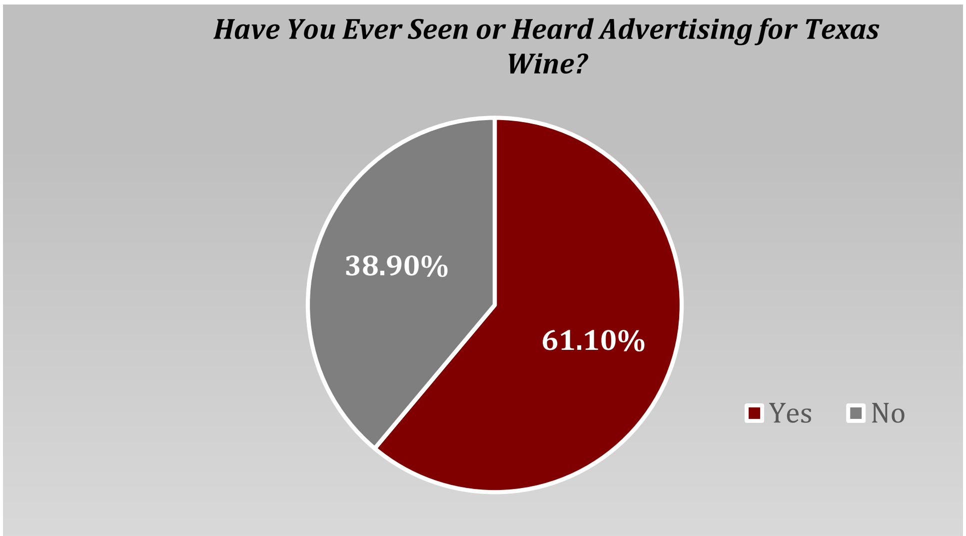


Figure 8. Percent Respondents Who Have Seen or Heard Texas Wine Advertising

The next question asked *where* they have seen information about Texas wines. Choices ranged from the traditional print media to social media platforms. Overall, the majority of respondents have seen promotions in traditional channels, such as billboards, magazine/trade journals, TV/radio ads (including podcasts), and brochures/pamphlets. A bit surprising was a low number of people (6.2%) who remembered seeing Texas wine advertisements on the Internet and social media. Also unexpectedly, special events, such as festivals, ranked low. Perhaps consumers simply do not perceive these events as advertising per se. In sum, traditional promotional channels still dominate in advertising of Texas wines.

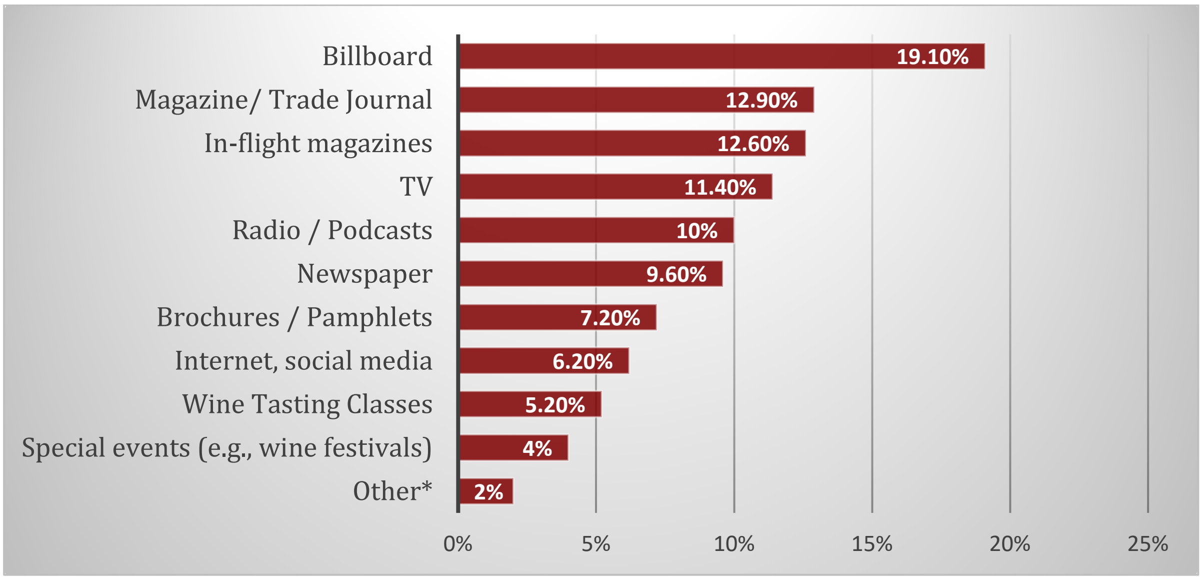
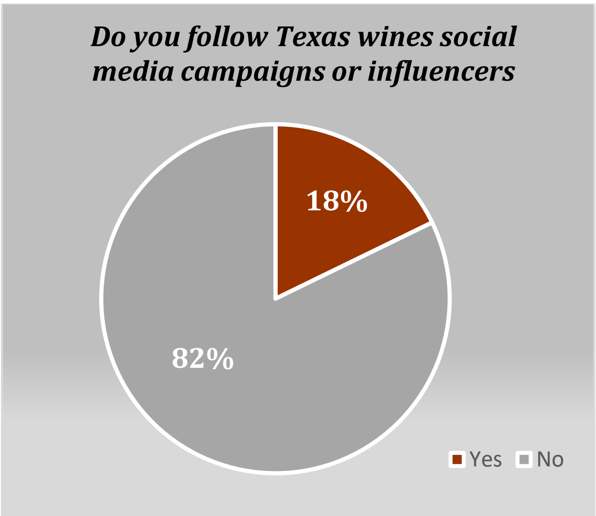


Figure 9. Most Seen/Heard Texas Wine Advertisement Channels

**Other – word-of-mouth (locals, friends); in-store; road signs/winery signs*

Social media is becoming the mainstream advertising channel for consumer goods. It allows producers to reach larger audiences and build their brands. However, the vast majority of respondents do not follow any Texas wine social media campaigns or influencers. Uncork Texas Wines is a website administered by the Texas Department of Agriculture, which provides comprehensive information about the Texas wine industry. Regrettably, most respondents in this sample were unfamiliar with the website.



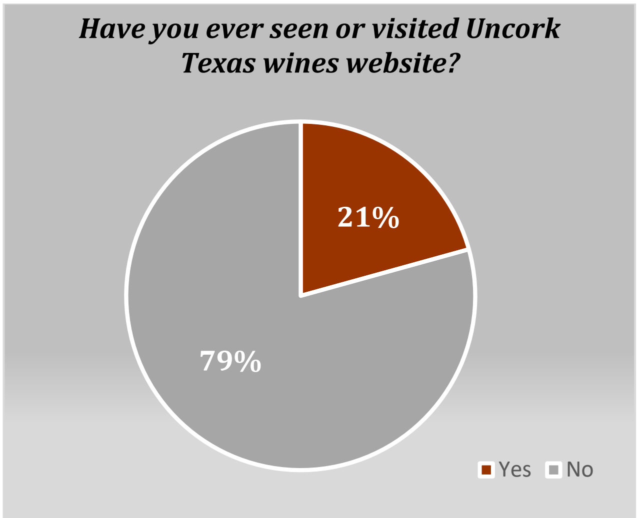


Figure 10. Texas Wine Social Media Awareness

Despite the low social media and online advertising awareness, those consumers who *do* follow Texas wine social media and websites, listed the following sources:

- Texas Fine Wine
- Uncork Texas Wines
- Real Texas Wine
- Texas Wine Lover
- Texas Wine Geek
- Texas Wine Trail
- Texas Wine Drinkers
- Texas Wine and Grape Growers Association (TWGGA)
- This is Texas Podcast
- Texas Monthly
- Texas Food and Wine Alliance
- Texas Wine Society
- Texas Wine Tours
- Texas Grape and Wine Education
- Texas Wine Grape Network
- Wine-Texas Friendly
- Additionally, many survey participants indicated they follow individual wineries pages on social media (mainly, Facebook, Instagram, and Twitter).

Topics of Interest

In order for the Texas wine marketing organizations and associations to better serve the needs of Texas wine consumers, a list of wine-related topics was presented in the survey. Respondents were asked to identify the topics that would peak their interest the most. The following represents a list of topics about which consumers would like to learn more. The topics are listed in the **descending order**, according to the number of consumer choices:

- Texas wineries
- Grape varieties grown in Texas
- Texas wine types and styles
- The history of Texas wine
- How to pair Texas wines
- How Texas wines are made

LABELS

Participants reviewed four identical wine labels (with the only difference being the images on the labels) and were asked to associate each label with an occasion for wine consumption. Two images portrayed widely recognizable Texas symbols (cowboy boots/hat and the outline of Texas map); whereas the other two labels displayed traditional images of established wine regions (château and vineyard slopes).

Judging by the overall number of responses, the Texas map label was the most chosen one, followed by château, and cowboy boots/hat. The label depicting a vineyard was the least chosen. As evident from the table below, consumers make distinctive choices of wine labels depending on the consumption situations:

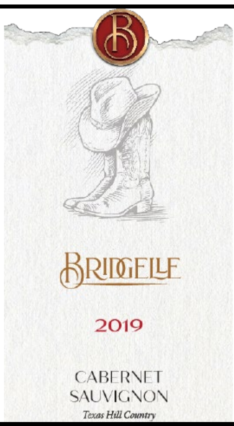
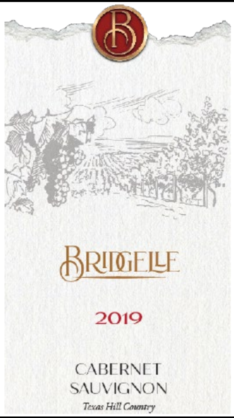
Cowboy boots/hat: By far, this label was perceived as the best choice for casual consumption at home. At the same time, it wasn't seen as quite appropriate for a special meal with guests or to give as a gift to a wine expert.

Texas Map: Being the most popular label, it was perceived as suitable for any occasion, except as a gift for expert wine drinkers.

Château: Given the traditional associations of châteaux with established wine regions, such as France, it is not surprising that this label was seen as relevant for any consumption scenario, with an exception of casual meal at home without guests. Consumers are likely to associate this label with imported wines, thus – higher prices. Considering the willingness of Texas consumers to pay less than $20 per bottle for casual wine consumption at home, the château label was definitely not their choice for home consumption.

Vineyard: This label was almost the opposite to the most popular Texas map label. Fewer consumers chose it for every occasion, except to give as a gift to a wine expert. Again, this could be due to the associations of vineyard slopes with the Old Wine regions, higher prices, and suitable for more knowledgeable wine drinkers.

Table 31. Choice of Labels for Various Occasions

				
Casual meal at home without guests	**44.5%**	15.2%	27.1%	13.2%
A gift to friends (novice wine drinkers)	**21.1%**	**31.3%**	**30.8%**	16.7%
Special meal at home with guests	17.8%	**32.8%**	**30.8%**	18.5%
A gift to expert wine drinkers	16.1%	**29.1%**	18.9%	**35.9%**
To bring to a host when going on vacation to another state/country	**20.5%**	22.5%	**37.7%**	19.4%

Phase II Findings: Interviews

Qualitative data from in-depth interviews with the Texas wine producers and tasting room employees were analyzed using comparative pattern analysis. This analysis method involves identifying recurring regularities in data and then sorting them into themes to link the underlying meanings. The method allows for identification of common patterns through analytic induction. Analytic induction is not a specific procedure or technique applied, but rather a logic or way of reasoning about claims generated from data. By analyzing the interviews data through the analytic induction methodology, the researchers were able to discover important themes.

Three distinct themes emerged from the analysis. The themes are presented below as brief summaries of the industry professionals' comments, ideas, and thoughts. Exemplary verbatim quotations (either typical ideas repeatedly emerging in interviews or especially illuminating ones) are included as bulleted lists to highlight the key points of each theme.

Theme #1: Positive changes in consumer attitudes towards Texas wines

Consumer attitudes towards Texas wine have shifted as the **younger generation is looking to purchase locally-made products more so than the previous generations**. With the increase in social media presence of Texas wineries, smaller wineries are now able to have a better (and more cost effective) marketing approach and promote themselves in a more specific manner.

- "The local Texas wine industry has changed a lot and COVID-19 has been a huge factor in the last two years. Since Texas wasn't completely shut down like other states, it helped us because people stayed local to go to different wineries."

- "Many consumers are starting to recognize that Texas wine is really good. They don't know too much about it, but the Texas Hill Country AVA is the second most visited in the US."

- "I think consumers are astonished that Texas wines are such delectable, high-quality wines. The wine industry in Texas - particularly on the High Plains - is a secret that needs to be known all over the world. For a long time, consumers have had a preconceived idea that Texas wines are poor quality, and rightfully so - given the Texas wine industry's rocky start. But now, they are always surprised to find out that tasty, well-crafted wines can be produced from grape to bottle here in Texas. Just yesterday, a customer at the winery remarked to me that the quality of Texas wines has *[making a gesture like a rocket launching]* since the early 1990s."

One of the major factors contributing to changes in consumer attitudes towards local wines was the **development of the Texas wine industry**. Several interviewees noted that the most distinctive change in the industry was **growers' larger involvement in the winemaking process**. There seems to be much more communication between the growers and the production teams at facilities, which ultimately leads to better final products.

- "Both grapes and wine quality has improved 100% in the last few years."

- "It seems that Texas growers have learned to settle into the grapes that grow best in Texas, rather than copy the "it" wines of other regions. They have experimented with the grapes and have come to terms with the fact that not all grapes thrive in Texas climate - which varies from desert to coastal climates and everything in between. In a sense, growers have become comfortable in their own skins."

- "Texas is growing all types of grapes now, compared to the past; plus, trying out new varietals that haven't typically grown in Texas."

- "There is less overhead for wineries now, and you can get grapes faster since so many people are growing grapes. Typically, we see profit within 5-6 years of opening. Profits drive quality."

Another change in perceptions is **consumer trust in the quality of local wines**. Texas wines are now seen as capable to stand against other major U.S. wine regions. Furthermore, the new market trend of **consumer acceptance of lesser-known varietal wines** works in favor of the Texas wine industry.

- "Texas wines have come a long way! A lot of compliments are "it's so good, I've never heard of this before". It's usually about our Roussanne and Mourvèdre, and other "non-California wines""

- "Out-of-state consumers are shocked by quality of Texas wine"
- "Customers regularly come in and want to try XYZ wine because they had that varietal at another winery, often in another state, and they want to compare. More times than not, they judge our wines to be superior. Once a customer wanted to try our Montepulciano because she'd had one in Italy at a small restaurant with an engaging waiter where she dined for hours… unfortunately, our Monte did not live up to that wine or that experience!"

Theme #2: Profile of the Texas wine consumer

Generally speaking, the vast majority of Texas wineries visitors are **local residents**. A few tasting room employees said they occasionally have visitors from New Mexico and other neighboring states, but mostly it's Texans.

COVID-19 introduced a few interesting changes. First, since less people travel internationally nowadays, **wineries are seeing more out-of-state visitors.** Secondly, due to a massive influx of relocations to Austin since the beginning of the pandemic, wineries in Fredericksburg are seeing more and more **former California residents exploring the Texas wine country.**

- We mainly see Texas locals. But lately, there are more people from California. They moved to Austin, they like wine, and they want to check out Texas wineries. They know nothing about Texas wine, but they are curious. And they are astonished by the quality of wines
- In addition to regular locals, we also see out of town guests. Mostly these are people visiting family or friends or passing through on a cross-country vacation
- "We see many couples. But I'd say the trend now is that younger people get more interest in wine. They visit in groups, mostly with friends or families"

Theme #3: Best Marketing Practices

All interviewees emphasized the critical importance of delivering **outstanding and memorable experiences** to tasting room visitors.

- "There is a change in consumer patterns as they value an overall experience and not necessarily just the wine. The consumer experience has become just as important - if not more important - than the quality of the wine."
- "Consumers want more upscale environments to drink with friends (as opposed to bars)."
- "Charcuteries are very popular now. And photo opportunities for everywhere! We are trying to make the "wine experience" as aesthetic as possible."

Consistency (both in the **quality of wine** and service **quality**) was noted as key for returning customers.

- "If you don't deliver experience for people, they won't come back. If you don't produce good wine, people won't try your wines next time. There will be no next time."
- "A couple that is part of our wine club regularly brings international students, staff, and faculty from Texas Tech."

Other important areas for consideration included using **marketing channels that are meaningful for the consumers.**

- "Visual media dominates the social landscape. Younger consumers are very visual. They will follow you on social media if there is something interesting for them to see and to hear."

Media plays an important role in creating an interest in Texas wines, and often in impulse tasting room visitations.

- "We see many people who drive by and say, "Look! A winery!"
- "Customers tell us, "I saw Texas on the cover of wine spectator and thought I'd give it a try."

Phase III: RECOMMENDATIONS AND DISSEMINATION OF RESULTS

To meet **Objective 3**, the researchers summarized the findings from the consumer survey data and the industry professionals' input and developed a set of marketing recommendations and areas of consideration to assist with the Texas wine marketing programs.

Summary of Findings

Who is the Texas wine consumer?

- While the majority of Texas consumers **prefer red wines**, when it comes to wine styles, the **most preferred** seem to be **sweeter wines,** even among those who favor red wines. This is especially applicable to women.
- Texas consumers purchase wine mainly through **grocery stores** and **liquor/wine shops.**
- **Online** wine shopping has **not gained much popularity yet**.
- On average, consumers are willing to spend **up to $20 on a bottle** of wine for casual consumption at home. Notably, they are willing to **pay more** (up to $30) **for a bottle of Texas wine**.
- **Price, brand, and region** are the top three factors affecting consumer purchasing.
- Despite the popularity of **organic** wines worldwide, this factor seems to be the **least important** for Texas wine consumers, at least for the time being.
- **Younger** consumers favor **beer** more than the older generations.
- Texas wine consumers are **not very knowledgeable about wine**, but are **interested in wine**, and would like to **learn more** about it.

What do Texans think of local wines?

- Texas consumers largely fond domestic wines. While California is still the top preference, **Texas comes out close second**.
- The vast **majority** of consumers **have tasted Texas wines in the past**, with over half having a glass of Texas wine **last month or more recently.**
- Consumers **purchase Texas wines quite frequently;** and for many, the share of Texas wine is rather high relative to all wine they purchase.
- Texas consumers overwhelmingly hold the opinion that local wines are **fairly priced.**
- They enthusiastically are **willing to recommend** Texas wines to other people and to **bring them as a gift** when going on vacation to another state or country.
- The **overall perceptions** of Texas wines are **very positive**. However, consumers feel that Texas wine **need to be better known** and **more widely available**.
- Remarkably, **younger generations** have **much better perceptions of Texas wines** than older generations.

Recommendations

Based on the results of this project, it can be inferred that Texas wine has earned a favorable reputation among its in-state consumers. The results are promising for Texas wine producers. At the same time, the project discovered some areas for improvement.

The two most notable findings of this study are as follows:

(1) Texans' increasing preferences for local wines

In 2015, a study of Texas wine consumers indicated that despite the strong sense of state identity, Texans still largely favored California wines. At the time, 48.2% preferred California wines, whereas only 15.5% named Texas wine their top choice (Johnston, Phelan, & Velikova, 2015). In the current study, the gap between the two regions became almost negligible: 24.1% preferences for California versus 21.1% for Texas wines. This is a **huge accomplishment for the industry.**

(2) A shift in consumer willingness to recommend Texas wines to others.

One earlier study of Texas wine consumers found that despite fairly favorable attitudes towards local wines, a large share of Texas wine consumers still felt reluctant when it came to recommending the local wines to others (Kolyesnikova, Dodd, & Duhan, 2008). Back then, the researchers explained this resistance by uncertainties in the quality of wine. Typical for emerging wine regions, as the market matures, so does its wine quality. This is evidenced by the vast majority in the current sample expressing desire not only to recommend Texas wines to other people, but also to bring them as a gift when going on vacation as a token of the state. The Texas pride is expressed by showcasing the local wines.

- **Recommendation:** The industry should continue **to produce quality products** that consumers can trust. Investments in technologies and improved communications between the growers and the producers are of critical importance, as this ultimately leads to better quality wines.

This study also revealed the **utmost value of experience**. The new market trend is consumers wanting **local products** and **supporting locally-owned businesses**, especially in the aftermath of the pandemic.

- **Recommendation**: While large producers will always have a market, today's consumers want **personal, unique, and intimate relationships with local businesses** more than ever. It's a silver lining of the dark cloud of COVID-19 and the months of quarantine and restrictions. The industry should use this unique opportunity to build relationships with its local customer base.

Although the overall trend of wineries and festivals visitations was quite positive in this study, given the tremendous growth in the number of Texas wineries within the last decade, the wine industry has much room to expand in terms of enhancing the frequency of tourists visits. Our data indicated that **Texans are yet to become acquainted with the abundance of wine tourism resources in the state**.

- **Recommendation**: The industry needs to focus on **designing wine tours and festivals** appealing to their consumers. The discovery of wineries as a place to gather with friends is a growing trend, especially for younger consumers. In the past, wineries were seen as a place for simply tours and tastings. Nowadays, consumers have a new and different option for socialization and entertainment. Wineries need promote their tasting rooms accordingly.

The data also showed that while Texas consumers consider themselves not very knowledgeable about wine, wine plays an important role of their lives. Yet, the vast majority does not belong to **wine clubs** and **do not follow wine trends and news**.

- **Recommendation**: The industry needs to do a better job in **signing up their loyal consumers to wine clubs**. This subscription channel not only increases wine sales, but also allows wineries to directly communicate with their target markets. Secondly, given consumer interest in learning about wine, **educational opportunities** should be created, focusing especially on the topics identified in this study as most appealing for Texas consumers.

Even though the sample was representative of wine consumers, **younger generations seem to favor beer** almost as much as wine.

- **Recommendation:** The wine industry needs to **learn from the craft beer industry** on how to market, promote, and educate customers about their products using the channels that are most meaningful for younger audiences.

Younger generations showed **much better perceptions of Texas wines** than older generations. This is promising for the industry.

- **Recommendation: Younger consumers** should be considered **the primary target market**, especially Gen Y, which showed the highest rankings of Texas wines on every dimension of quality and taste evaluations. Yet again, the industry needs to learn to talk to this market through marketing channels that are meaningful for this generation. The study revealed that **social media is still largely unutilized by the industry**. Publicity is also needed for dissemination of information about Texas wine through various websites (such as Uncork Texas), blogs, and podcasts.

Lastly, while the quality of Texas wines was perceived positivity by the vast majority of consumers, a slightly worrying sign was that consumers think of Texas wines mostly as **easy-to-drink** and **suitable for casual home consumption,** but not so much for fine dining or to give as a gift to a person who is knowledgeable about wine.

- **Recommendation**: The industry needs to continue deliver the message that Texas wines are **able to stand against other major U.S. wine regions**, and **are on the road to become world-class wines.**

Dissemination of Results

The purpose of Phase III was also to disseminate the findings of this project to the Texas wine industry and organizations that perform marketing for Texas wines. Dissemination will be accomplished through website-based materials, social media, presentations, trade and scholarly publications.

First, the information will be shared with the Texas industry practitioners through a presentation at the **Texas Wine & Grape Growers Association Annual Conference.**

A **report** outlining the findings and recommendations will be posted on the **website** of the Texas Wine Marketing Research Institute. The report will be featured on the Institute's social media platforms – Facebook, Instagram, and Twitter. The Institute has numerous followers, with the vast majority being wine practitioners. In addition, the report's availability will be announced through the **partner organizations' newsletter**s.

The findings will be incorporated into the **curriculum** of the Wine Business Certificate Program offered by the Texas Wine Marketing Research Institute. The program is designed for people seeking to enter the Texas wine industry or to advance their current careers in the industry. This information will largely contribute to their understanding of the industry, the consumers, and the marketing strategies needed.

Lastly, investigators will share the findings through **academic publications** in top-tier peer review hospitality journals.

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Appendix
Survey of Texas Wine Consumers

Q1. Invitation

You are invited to participate in a study about Texas wines. There are no right or wrong answers, we only ask for your opinions. The survey will not take longer than 12 minutes to complete. Your answers will help marketers to better serve customers like you. In order to participate, you must be of legal drinking age (21+).

- I AGREE to participate in this survey.
- I DO NOT AGREE to participate in this survey.

*If "I DO NOT AGREE" is selected, respondents are **screened out** and redirected to the **End of the Survey** message: "Since you do not agree to participate in this survey we thank you for your time."*

Q2a. Please choose your year of birth from the dropdown menu: ____

*If "None of these years" is selected, respondents are **screened out** and redirected to the **End of the Survey** message: "Since of you are not at the legal drinking age (21+), you cannot participate in this survey. Thank you for your time."*

Q2b. Do you currently live in the state of Texas?

1. Yes.
2. No.

*If "No" is selected, respondents are **screened out** and redirected to the **End of the Survey** message: "This project aims to survey Texas residents. Since you do not live in the state of Texas, this study does not apply to you. Thank you for your time."*

Q2c. What is your gender?

1. Male.
2. Female.
3. Non-binary / third gender
4. Prefer not to say

BLOCK 1 – WINE CONSUMER BEHAVIOR

Q3. Which of the following alcoholic beverages do you drink most often?

1. Wine
2. Beer
3. Spirits
4. Other _____ (*please, specify*)
5. I do not drink alcoholic beverages

*If "I don't drink alcoholic beverages" is selected, respondents are **screened out** and redirected to the **End of the Survey** message.*

Q4. On average, how often do you consume wine?

1. Every day.
2. At least once a week.
3. Several times per month.
4. Every few months.
5. I do not consume wine.

*If "I do not consume wine" is selected, respondents are **screened out** and redirected to the **End of the Survey** message*

Q5. On average, how much do you typically pay for a bottle of wine for casual consumption at home *(please, insert a dollar amount)?* _____

Q6. Where do you prefer to buy wines?

1. Supermarkets (*e.g., Walmart*)
2. Tasting rooms
3. Winery's website
4. Grocery store (*e.g., United, HEB*)
5. Liquor / wine shop (*e.g., Total Wine & More*)
6. Online wine retailer (*e.g., wine.com*)
7. Online grocery retailer (*e.g., HEB.com*)
8. Hypermarkets (*e.g., Costco, Sam's Club*)
9. Other _____ (*please, specify*)

Q7. What type of wine do you consume most often?

1. Red wines.
2. White wines.
3. Rosé / blush wines.

Q8. What level of sweetness/dryness do you prefer your wine to be?

1. Dry.
2. Sweet.
3. Semi dry.
4. Semi sweet.

Q9. Rank the following factors in terms of their importance to you when purchasing wine *(drag and drop each item; 1 is the most important)***:**

1. Price
2. Brand
3. Region of Origin
4. Label design
5. Accessibility
6. Grape variety
7. Organic
8. Vintage

BLOCK 2 – ATTITUDES TOWARDS TEXAS WINES

Q10. Have you ever tasted Texas wines?

1. Yes.
2. No.

If "No" is chosen, redirect to ***Q12****.*

Q11. How recently did you taste Texas wine?

1. last week
2. last month
3. a few months ago
4. about a year ago
5. a few years ago
6. many years ago

Q12. How much do you agree with the following statements on Texas wines?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
good value for money	1	2	3	4	5
well-known	1	2	3	4	5
appropriately priced	1	2	3	4	5
good quality	1	2	3	4	5
widely available	1	2	3	4	5
world-class	1	2	3	4	5
better than expected	1	2	3	4	5

Q13. What do you think about the taste of Texas wines?

Texas wines …	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
are easy to drink	1	2	3	4	5
are complex	1	2	3	4	5
have a lot of different styles	1	2	3	4	5
all taste pretty much the same	1	2	3	4	5
are uniquely different from wines from other countries	1	2	3	4	5

Q14. Texas wines are…

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
good to give as a gift	1	2	3	4	5
suitable for special occasions	1	2	3	4	5
good to drink at home	1	2	3	4	5
suitable for casual dining out	1	2	3	4	5
suitable to drink at fine dining restaurants	1	2	3	4	5
go well with food	1	2	3	4	5
go better without food	1	2	3	4	5

Q15. Overall, what do you think of Texas wine prices?

Very underpriced	Underpriced	Fairly priced	Overpriced	Very overpriced	Unable to answer
1	2	3	4	5	6

Q16. How much would you pay for a bottle of Texas wine (*please, insert a dollar amount*)**?**

Q17. How often do you buy Texas wines?

1. At least once a week or more often
2. Several times a month.
3. Every couple of months.
4. About once a year or less often
5. Never.

*If "Never" is selected, redirect to **Q19, Q24-29, Q30-33, Q40-41, Q34-39, and then the End message**.*

Q18. Considering only the wine you buy, what percentage of it is Texas wine *(please, insert a percentage)***?** ______

Q19. Wine from which region do you buy most often? *Three choices can be selected***.**

1. France.
2. Italy.
3. Germany.
4. Spain.
5. Portugal.
6. Australia.
7. Argentina.
8. Canada.
9. New Zealand.
10. South Africa.
11. California
12. Texas
13. Washington State
14. Oregon
15. New York State
16. Chile.
17. Greece
18. Other ___ (*please, specify*).

Q20. How likely are you to recommend Texas wines to others?

Extremely unlikely	Unlikely	Not sure	Likely	Extremely likely
1	2	3	4	5

BLOCK 3 – WINE TOURISM

Q21. Have you ever visited Texas wineries?

1. Yes
2. No

*If "No" is selected, redirect to **Q23**.*

Q22. Prior to the beginning of COVID, approximately how many Texas wineries have you visited in a one-year timeframe (*please, put the number*)**?** _____

Q23. Have you ever been to a festival involving Texas wine?

1. Yes
2. No

BLOCK 4 – TEXAS WINE REGIONAL BRAND RECOGNITION

Q24. Have you ever seen or heard advertising for Texas wine?

1. Yes
2. No

*If "No" is selected, redirect to **Q26**.*

Q25. Where have you seen information about Texas wines? *Please, select all that apply*.

1. Billboard
2. Magazine/Trade Journal
3. In-flight magazines
4. TV
5. Radio
6. Newspaper
7. Brochures/Pamphlets
8. Internet, social media
9. Wine Tasting Classes
10. Special events (*e.g., festivals*)
11. Other ___ (*please, specify*)

Q26. List <u>three Texas wine brands</u> that immediately come to your mind (*if you cannot remember, please write in the first row "no"*)**:**

1. ___________
2. ___________
3. ___________

Q27. Have you seen or visited Uncork Texas Wine website?

1. Yes
2. No

Q28. Do you follow any Texas wine social media influencers or campaigns?

1. Yes
2. No

*If "No" is selected, redirect to **Q30**.*

Q29. Please, write down which of Texas wine social media influencers or campaigns you follow: ____

BLOCK 5 – INVOLVEMENT

Q30. Are you a member of a wine club?

1. Yes.
2. No.

Q.31. Do you work in or on behalf of the wine industry?

1. Yes
2. No

Q32. How do you assess your level of knowledge about wine?

1. New to wine; know nothing about it.
2. Know a little about wine.
3. Somewhat knowledgeable about wine.
4. Very knowledgeable about wine.
5. Expert or professional.

Q33. How much do you agree with the following statements?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Wine is important to me	1	2	3	4	5
I have a strong interest in wine	1	2	3	4	5
I like to be engaged in conversations about wine	1	2	3	4	5
I follow the latest trends in wine	1	2	3	4	5

Q34. Which of the following topics would you like to learn more about? Please, select all that apply:

1. The history of Texas wine
2. How Texas wines are made
3. Grape varieties grown in Texas
4. Texas wine types and styles
5. Day in the life of a winemaker/viticulturist
6. How to pair Texas wines
7. Texas wineries
8. Other ___ (*please, specify*)
9. None of them

BLOCK 6 – DEMOGRAPHICS

Q35. Please, indicate your zip code: _____

Q36. Overall, how many years have you lived in Texas? ______

Q37. Which of the following categories come closest to your total annual household income?

1. Under $20,000
2. $20,000 - $39,999
3. $40,000 - $59,999
4. $60,000 - $79,999
5. $80,000 - $99,999
6. $100,000 - $119,999
7. $120,000 - $139,999
8. $140,000 or more
9. Prefer not to respond

Q38. What is the highest level of education you have completed?

1. No formal qualifications (no high school diploma).
2. High school diploma.
3. Technical/ vocational qualifications.
4. Bachelor's degree.
5. Master's degree.
6. PhD.
7. Other ___________ (*please, indicate*)

Q39. Please, indicate your marital status

1. Single
2. Married or Living common law
3. Separated or Divorced
4. Widow
5. Other
6. Prefer not to respond

BLOCK 8 – TEXAS IDENTITY

Q40. How much do you agree with the following statements?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
I prefer living in Texas rather than any other state	1	2	3	4	5
I have a lot of pride in my state	1	2	3	4	5
I feel proud when I see the Texas flag flying	1	2	3	4	5

Q41. How much do you agree with the following statements?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Overall, Texas-made products are better than products from other states	1	2	3	4	5
When grocery shopping, I make an effort to choose Texas-made products	1	2	3	4	5
Even if Texas-products cost more, I will buy them	1	2	3	4	5
I believe Texan culture is different from other cultures	1	2	3	4	5

BLOCK 9 – LABELS

Q42. Which wine would you choose for each of the following occasions?

				
Casual meal at home without guests				
A gift to friends (novice wine drinkers)				
Special meal at home with guests				
A gift to expert wine drinkers				
To bring to a host when going on vacation to another state/country				

END MESSAGE

*"Thank you for participating in the survey! For recording your answers, please make sure you click on the "**Next**" button."*

After clicking the "Next" button, participants were redirected to the Uncork Texas Wines website