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MATURITY IN THE WEBSITES OF AUSTRALIAN WINERIES: A STUDY OF VARYING WEBSITE CONTENT

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ABSTRACT

This paper examines the longitudinal development of 86 Australian winery websites over a two-year period. Wineries, like many Australian businesses have websites that offer a range of facilities for the consumer: information provision, online ordering, and community participation. The 2002 study, when contrasted with a study conducted two years earlier, has unearthed some trends in the development of Australian winery websites. Other features have been introduced to encourage extra visitors to the winery. More wineries offered the chance for customers to purchase their offerings over the Internet. However, this was not generally accomplished by using an interactive sales feature—it was by providing a form to print out and fax to the winery. In general, it appears that there is some maturity developing in the websites of Australian wineries.

KEYWORDS

Australia, Website content, Wineries, Longitudinal study

BIOGRAPHICAL NOTES

Stephen Burgess is a Senior Lecturer in Information Systems at Victoria University, Melbourne, Australia. His PhD from Monash University, Australia is in the area of small business to consumer interactions on the Internet. His research interests include the use of IT in small business, the strategic use of IT, B2C electronic commerce and Management IT education. His research has recently targeted the tourism and medical fields. He has recently edited a book through Idea Group

Publishing, Managing Information Technology in Small Business: Challenges and Solutions. Stephen is a co-founder of the IRMA Special Research Cluster on Small Business and Information Technology (www.businessandlaw.vu.edu.au/sbirit/).

Carmine Sellitto is a lecturer in the School of Information Systems at Victoria University (Melbourne) and teaches in the area of Web Enabled Business Systems, and Management Information Systems. Dr Sellitto completed a PhD at RMIT University in 2004 examining Internet adoption by Australian small wineries— a study that led to a proposed e-business best practice model. Dr Sellitto has published widely on topics associated with e-business, including website design and implementation—with many of his publications reporting the adoption of IT/Internet by Australian SME wineries

Andrew Wenn is a lecturer in the School of Information Systems at Victoria University, Melbourne where he is currently undertaking his PhD. His main field of research is the nexus between the social and the technical, particularly in information systems. Andrew has many publications in this area as well as in Internet-based education and e-commerce and small business in Australia. He is a member of the Editorial Review Board of the *Information Resources Management Journal* and is also a member of the Editorial Board for the forthcoming *Encyclopedia of Communities of Practice in Knowledge Management*. He co-edited a book *Socio-Technical and Human Cognition Elements of Information Systems* published by Information Science Publishing (2003) and is a Series Co-editor for the planned Routledge Series in Information Systems. He edited and contributed to *Skilling the e-Business Professional* published by Heidelberg Press (2002).

INTRODUCTION

Various authors have examined the adoption of websites by wineries. Major [1] proposes that a winery's website tends to reflect its Internet adoption experience, with the increasing degree of website complexity reflecting an increasing business value for the winery. Stricker et al. [2] in their study of Californian, Australian and German winery websites noted that Californian and Australian winery websites were more focused on selling wine over the Web, whereas the German sites tended to concentrate on information provision. Goodman [3] concluded from his study of South Australian wineries that the Internet allowed the reach of the small and medium sized winery to extend to the global marketplace, with evidence that some wineries could reduce perceived export barriers. Alpin [4] reports that website adoption can provide a winery with a powerful channel to search and acquire suitable business information in a relatively cost effective and easy manner, facilitating better business decision making. Moreover, Alpin indicates that wine is one of the product categories that is best suited to being purchased via a website but does warn that there is the potential to disrupt sensitive and traditionally established winery-distributor relationships. Symonds [5] studied winery website design examining aspects such as the aggregate number of pages, the location and the type of navigation aids on pages, website images, current information and the design consistency of pages. All these studies collectively provide an overview of various aspects of website adoption in a specific industry sector— the wine industry.

This paper complements previous work of the authors and examines the development of the websites of Australian wineries over a two-year period. It is based on a longitudinal study of those websites that was conducted by the authors in early 2000 (referred to in this paper as 'the 2000 study') and repeated in early 2002 ('the 2002 study'). The particular website features examined were those related to information provision, ordering and sales, and opportunities for wine-lovers to become part of the online community. The level of detail of website features examined provides some insight into how wineries have been using the Internet over the study period as an adjunct to their normal business.

In this instance, the longitudinal nature of the study is required to determine how the websites have altered over time. The authors felt that a two-year period would be sufficient enough to show if the owners of wineries were implementing changes to their websites—allowing them enough time to absorb the impact of their website (in 2000) and make at least one annual change before the 2002 study.

THE AUSTRALIAN WINE INDUSTRY

The most influential issues affecting rates of return for most Australian wineries are those associated with the 'downstream' factors, specifically the cost of marketing, selling and distribution [6][7]. Small and medium sized winery owners find that the downstream component of their business involves significant reliance on direct distribution—an important factor for many of the industry's new entrants yet to develop brand recognition—which is achieved via traditional direct marketing such as mail-order/newsletter and cellar door tourism. The direct marketing approach not only allows the winery to develop wine brand recognition but also to gain substantial taxation rebates on all their direct customer sales. The Australian Wine Equalisation Tax (WET) was introduced in June 2000 in conjunction with widespread taxation reforms making Australian wine one of the highest taxed in the world [8][9]. The WET is levied on the wholesale price of wine and is collected at the last point of interaction with the consumer—that is, by the winery in a direct sale or the retailer in an over the counter exchange. However, both Federal and State governments have recognised the importance of small wineries to the development of regional and rural areas through tourism. Hence, in an endeavour to facilitate wine tourism and improved regional economic outcomes, wineries are entitled to a form of compensatory subsidy and enjoy a WET rebate of 29% on any direct sales. One of the pathways for the small winery— either new or established— is to leverage the taxation rebate on direct sales via mail-order, cellar door or recently the Internet via the WET rebate to achieve augmented profitability. Figure One indicates the various downstream Australian winery distribution options and the impacts of taxation and intermediary margins [11]. In Figure One, ‘GST’ represents the Australian Goods and Services Tax of 10% introduced in 2000. In 2004, the formula for administering the WET scheme was altered allowing small wineries to claim taxation rebates for all direct wine sales regardless of distribution— a scheme change that also included a substantial increase in the claim threshold, with a commensurate effect on business profitability.

This study provides an important longitudinal view of the evolution of websites in an industry that is a mix between manufacturing and tourism and where substantial incentives exist (the WET rebate) for smaller wineries to sell their products using the Internet— incentives that are not available to other small businesses.

The Online Winery: Other than Sales, What to Offer?

Most wineries will set up a website to assist with sales in some way. If those sales do not occur online, they must occur through more traditional means (such as direct purchases at the winery or through a distributor). There are several features that can be implemented on a website to assist with this [11]:

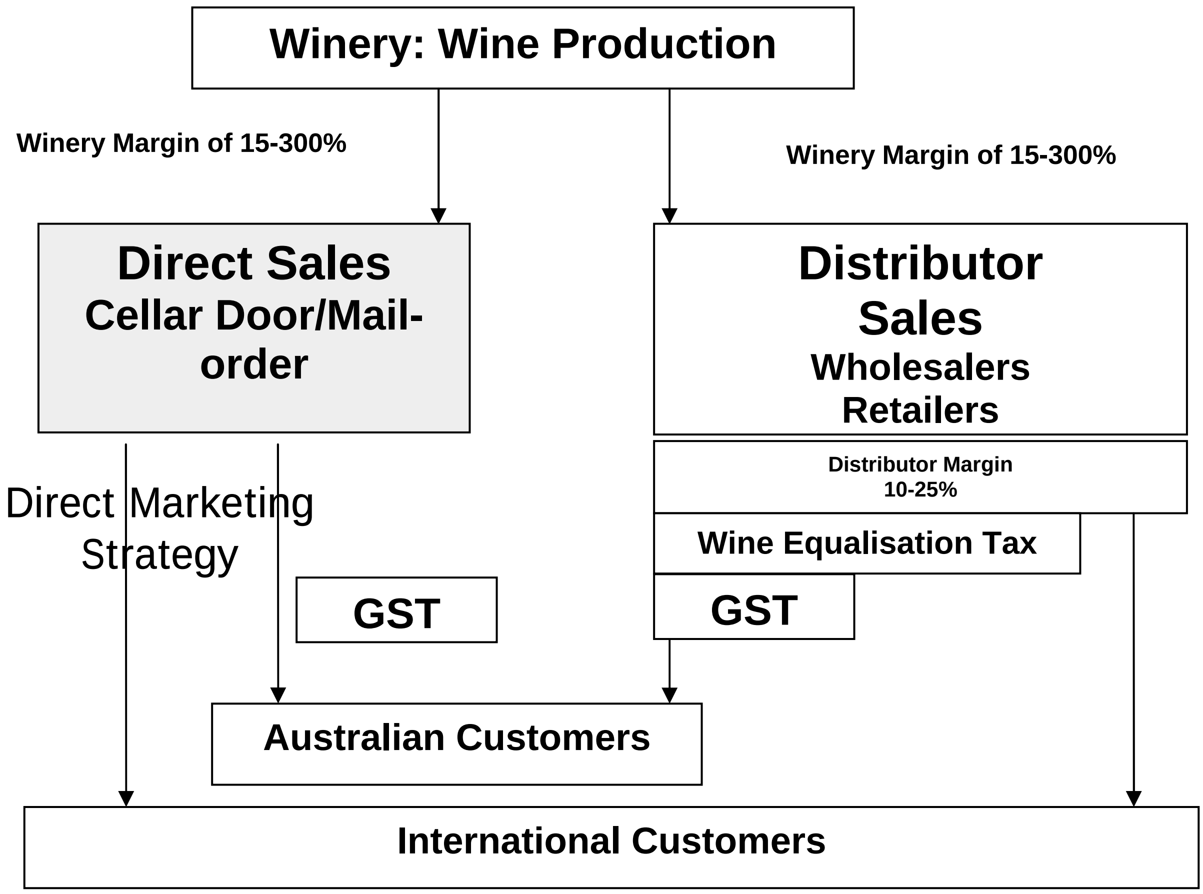

Figure 1: Australian Winery Distribution Chain

- **Information Provision**: It is very inexpensive to provide basic information about the winery on a website. By this, we mean that it is relatively inexpensive to set up a basic website (even for a small business) and put information on it. We acknowledge that costs may increase if that information has to be updated regularly. At the very least, firms should promote their goods in some manner on their own websites. They can do this by supplying information about new offerings, emphasising successes and communicating events. Careful information provision can assist with branding. Brands create a basis for trust between a business and its customers. A business dealing with consumers over the Internet may require even stronger branding because hypertext makes it so easy for them to look elsewhere [12]. Branding is important on the Internet. Consumers will still generally buy brands that they know and trust [13].
- **Ordering and Sales**: Sellitto and Martin [14] contend that the Internet is an emerging and important distribution channel that allows wineries to direct market to consumers as a substitute for the traditional winery mail-order catalogues.

- **Communities**: The websites of wineries are ideal for setting up wine clubs. Customers who become members of clubs or subscribe to membership lists can feel that they are getting 'added value' from the business and/or are interacting with like-minded people. These are online communities. Another possibility here is the provision of information on a winery's website about its local region (regional activities, other tourist attractions or maybe even including local competitors) to draw potential cellar door customers to the winery (regional community information).

These categories form the basis of the longitudinal study reported in this paper.

THE 2000 AND 2002 STUDIES

The 2000 study was based upon James Halliday's Wine Companion CD [15], which contains a comprehensive list of most wineries in Australia and New Zealand, listing 1210 wineries. Of those, 126 (10.4%) were listed as having websites. This was much less than the average for all Australian small businesses (25%) at the time. A review of each of these sites occurred in January 2001 by attempting to browse each site. Although the '2000' study was conducted in early 2001, we are referring to it as the 2000 study as the process of 'filtering' and categorising the websites began in 2000. Of the 126 website links, 13 of the links did not lead to websites, five were 'under construction', two led to a site that was not the winery and one would only allow access to members. This meant that 105 of the sites could be visited. Each of these sites was browsed in January 2001 to determine if they had implemented the features identified earlier. To remind the reader, these were:

- Information Provision:
    - General - About the business, Latest News, Press Releases,
    - Product - About the wines, Customer reviews, Awards (new to the 2002 study)
    - Contact Information - Email address, Business address, Telephone, Fax, Location Map

- Ordering and Sales
    - Option to print an order form and send or fax it in
    - Complete an online form, which is then emailed to the winery
    - Order direct through email link
    - Online interactive ordering and payment
- Community
    - Membership Club or Mailing List
    - Regional information

The follow-up study reported here was conducted nearly two years later (December 2002) to determine the changes that had occurred on the websites examined in the 2000 study. Please note that the wineries have been kept in their earlier size classification (refer next section), although they may have changed in size since the previous study. This is to allow for as direct a comparison as possible with the earlier study.

Method of Classification

In Burgess, Wenn, Sellitto [11] we reported that there seemed to be no universally agreed method of classifying wineries in terms of size. We eventually decided to use of the number of cases of wine produced per annum, where that detail was provided in Halliday [15]. Of the 105 websites studied in the 2000 study, only 86 provided production information that allowed us to classify them by size. Thus, we analysed 86 websites in the study in 2000. Table One shows the number of websites accessed in 2000 and how many we were able to examine again in 2002.

Table One: Classification of Winery Size Based on Output.

Classification	**Output (cases per annum)**	**Websites Accessible (2000 study)**	**Websites Accessible (2002 study)**
Large	200000+	9	8
Medium	50000-200000	12	10 (2 developing new sites)
Small	10000-49999	21	20
Micro	2000-9999	28	24
Hobby	<2000	16	14
Total		**86**	**76**

It is common for small businesses with 1-5 or 1-10 employees to be classified as 'micro' businesses. The authors felt that it was useful to introduce a category of wineries before this, 'hobby', for the smallest wineries. 'Hobby' businesses are differentiated from other micro businesses as they generally fall into the class of very small family operations. Using this classification method we then tabulated the features each winery website had.

The reader will note from Table One that there were fewer wineries in the 2002 study (76) than the 2000 study (86). In the case of the large winery, the website had been virtually removed (it was replaced by a one page 'customer competition'). With the medium wineries, it is because their websites were being redeveloped. For the small, micro and hobby wineries it was because the websites of the wineries could not be found. There were initially 14 wineries where the website could not be found based upon the previous URL that had been used. It was surmised that this was because they had changed service providers or had altered their domain name. In these instances, a 'guess' was made at the current address of the website, for instance **www.*nameofwinery*.com.au**

Three wineries were found in this way. They had gone from using a 'subdomain' URL (of their service provider) to their own domain name. The next strategy was to type the name of the winery into the search engine, Google Australia (www.google.com.au). This resulted in references to all the remaining wineries being found, but not necessarily their website. The websites of two of the wineries were found in this way. There was no indication that the other four wineries had gone out of business—for instance, there were many tourist links referring to them. It appears they no longer had their own website. The ANZWID [16] directory lists details of businesses in Australia and New Zealand. Two of the hobby wineries were found using this directory.

In the results section the various features available on Australian websites for both studies are reported as a percentage of all classifications of wineries. In addition, there will be an examination of the number of wineries that:

- Did not adopt a particular website feature at all
- Had a feature in 2000 but not in 2002
- Introduced a feature in 2002
- Had a feature in both 2000 and 2002.

It was anticipated that websites of most wineries would have expanded over the period and would have more features on their websites in 2002 than in 2000.

Method

This study had many elements of an exploratory case study approach [17][18], the ‘case’ being the Australian wine industry, ‘exploratory’ being aimed at formulating more precise questions that future research can answer [18]. However, as a result of the 2000 study we had a much better idea of the constructs we were examining. This makes our approach more of an exploratory ‘field study’ of the websites of Australian wineries.

Our data collection technique involved the observation of each of the 86 websites for the 2000 study and 76 websites for the 2002 study. The technique used to analyse the websites and identify the website features was developed by one of the authors as part of his PhD thesis [19] and has been subsequently used by Burgess and Zoppos [20], Shackleton *et al* [21] and by the authors for the 2000 study [11]. For this type of content analysis, Henderson and Cowart [22] cite McMillan [23] in suggesting some steps that need to be followed. Firstly, the sample websites need to be selected carefully. In our case, the websites selected are as close as possible to an actual 'population' (of Australian winery websites) listed in Halliday [15]. The next task is to define the unit of analysis categories. These have been used as they were developed in Burgess [19]. The next important step is to train the judges examining the websites to ensure that each of them is 'measuring' in the same manner. In our case, we had the advantage of being able to utilise the same research assistant for both studies. Finally, the data are gathered, analysed and interpreted.

RESULTS

Information Provision

1. General Information

Table Two shows the breakdown of wineries that displayed some type of general information on their website for the 2000 study and the 2002 study.

Table Two: Percentage of Australian Wineries with General Information on their Website

Classification	**About the Business (%)**		**News (%)**		**Press Releases (%)**	
	2000	**2002**	**2000**	**2002**	**2000**	**2002**
Large	89	100	78	88	22	38
Medium	83	100	75	70	25	10
Small	81	95	62	80	0	15
Micro	79	96	50	50	11	17
Hobby	62	79	38	57	6	0
Overall	**78**	**93**	**57**	**66**	**13**	**14**

In 2000 it was expected that the majority of wineries would provide some type of information, mostly about the business. Large and medium wineries were more likely to provide 'latest news' and 'press releases', probably because they were more likely to have them. Table Two confirms this, with a greater proportion of the large and medium sized wineries providing general information than with the smaller ones. In 2002 this still appeared to be the case with the large wineries, with small and micro wineries making up some of the ground. Less than two thirds of hobby businesses provided even basic information about the business in 2000, but this had improved to 78% of businesses in the 2002 study. More wineries in all categories provided background information about the business, with virtual saturation of that feature in all except the hobby wineries.

There was a general increase in the number of wineries that provided information ‘about the business’ and ‘news’. In the case of ‘about the business’, the 15 % increase came about solely from wineries that had added the feature for the first time. In relation to ‘news’, the 9% increase happened because 18% of wineries added the feature for the first time and 9% of wineries that had the feature in the first study dropped it. This was similar to ‘press releases’—although the overall usage figure was similar across the two studies, 8% of wineries added the feature whilst 7% dropped it. This indicates some uncertainty in the perceived value of those two features by wineries.

2. Product Information

Table Three: Percentage of Australian Wineries with Product Information on their Website

Classification	**About the wines (%)**		**Customer reviews (%)**		**Awards (%)**
	2000	**2002**	**2000**	**2002**	**2002**
Large	89	100	22	12	50
Medium	92	100	17	20	60
Small	95	100	33	30	45
Micro	71	96	18	17	33
Hobby	62	71	12	0	7
Overall	**80**	**93**	**21**	**17**	**37**

Table Three shows the Australian wineries that displayed information about their wines on their websites. In the 2000 study information provided about products was lower for micro and hobby wineries. At the time of the 2002 study, nearly all the micro wineries were at least providing information about their wines. Generally, more wineries were prepared to publish information about their individual wines on the web than in the last study. The larger ones tended to boast about the awards (not examined in the 2000 study) they have achieved. The awards enable particular wines to be differentiated from others allowing the consumers to use an award type as a selection criterion before purchase.

The overall increase of 13% in wineries that provided information ‘about the wines’ was primarily attributable to wineries adding the feature for the first time (14%), with only one winery dropping the feature. There were actually fewer wineries offering ‘customer reviews’ in 2002 than in the previous study, with 5% adding the feature for the first time and 9% dropping the feature. Nine out of 10 wineries provided specific product information on their websites by the time of the later study.

3. Business Contact Information

The Internet provides an opportunity for a business to tell its customers how to contact it. Table Four shows the breakdown of Australian wineries that displayed some type of business contact information on their website in the 2000 and 2002 studies.

Table Four: Percentage of Wineries with Business Contact Information on their Website

Classification	**Email (%)**		**Address (%)**		**Telephone (%)**		**Fax (%)**		**Location Map (%)**	
	2000	**2002**	**2000**	**2002**	**2000**	**2002**	**2000**	**2002**	**2000**	**2002**
Large	100	100	100	100	100	100	100	100	22	25
Medium	92	80	92	80	75	80	75	80	42	70
Small	86	90	90	95	90	95	86	90	24	50
Micro	93	100	93	100	93	100	89	96	32	38
Hobby	100	100	100	86	100	86	100	79	44	57
Overall	**94**	**95**	**95**	**93**	**92**	**93**	**90**	**89**	**33**	**47**

In the 2000 study, we observed that there seemed to be no ‘size related’ reason regarding why a business would not provide contact details. In both studies, all websites had at least one ‘method’ of contact listed on their website. It is interesting that there were a few websites that neither included address nor telephone contact details, this number was lower in 2002. Except for all large wineries providing email, address, telephone and fax contact details in both studies, the only apparent trend is that an increasing number of the wineries have realised the importance of including a location map on their website since the 2000 study.

The results for the Email, Address, Telephone and Fax business contact features were all similar. There were minor changes in the overall usage levels across the studies, but fluctuations were between 3-5% of wineries that added the feature for the first time, and a similar percentage dropped the feature. In relation to the 'location map' feature, there was an overall increase of 14%, comprising 19% of wineries that added the feature for the first time and 5% of wineries that dropped it. There was a significant increase in the percentage of all types of wineries, except large ones that had a location map.

Ordering and Sales

Table Five shows the breakdown of Australian wineries that allowed some type of ordering and/or sales to occur on their website in the two studies. The website feature shown in the first column, 'Print Order Form and Fax' did not allow submission of the order through the website. The business provided a form on the website that could be printed out by the customer and then faxed to the business. The second column, Ordering by Web Form, refers to where websites contained a web form that could be filled out by customers. Details are sent to the business (usually via email) when the customer clicks on the 'Submit' button. 'Order Direct by Email' is where the business provides their web address on the website and takes orders directly via email from the customer. 'Online Sales (Interactive)' refers to real-time order and credit card processing. The final column, Total 'Online' Ordering, represents the percentage of wineries that had some type of online sales occurring by submission through the website (see the shaded columns). The total of the previous three columns and the final column do not 'add up' as some of them had more than one type of online ordering facility on their websites.

Table Five: Percentage of Australian Wineries with Ordering and Sales Facilities on their Website

Class	Print Order form and Fax (%)		Ordering by Web Form (%)		Order Direct by Email (%)		Online Sales (Interactive) (%)		Total 'Online' Ordering (%)	
	2000	**2002**	**2000**	**2002**	**2000**	**2002**	**2000**	**2002**	**2000**	**2002**
Large	0	12	11	12	0	0	0	0	11	12
Medium	17	10	8	10	0	0	0	0	8	10
Small	14	25	19	15	0	10	29	35	48	50
Micro	25	42	18	17	4	8	29	25	40	50
Hobby	12	29	50	50	0	0	19	14	62	64
Overall	**16**	**28**	**22**	**21**	**1**	**5**	**20**	**20**	**38**	**43**

Results from both studies show that large and medium wineries do not sell directly on their websites, and not many take orders. They rely mainly on online distributors and traditional markets. Small, Micro and Hobby wineries do allow ordering in some form over the Internet. An examination of the last column of Table Five shows that, since the last study, all the classifications have shown a small increase in their readiness to accept direct online orders. However, the major increase in ordering via the Internet has been through the 'Print Form and Fax it' option, particularly for small, micro and hobby wineries.

As mentioned earlier, Sellitto and Martin [10] contend that the Internet is an emerging and important distribution channel that allows wineries to direct market to consumers as a substitute for the traditional winery mail-order catalogues. Moreover, they suggest that the Internet is a particularly effective means to maximize the Wine Equalisation Tax (WET) benefits that many small winery owners are reliant on in Australia to be cost effective. The larger winery that already has established distributors and has reduced WET rebate opportunities— which reduce as sales grow— would be less likely to take advantage of Web sales. The results reported here tend to support those findings and flag the importance of the smaller winery website as a distribution channel for direct sales to aid in maximizing the WET rebate.

As indicated above, the main area of increase for online sales was in relation to the 'Print Order Form and Fax it' option. The overall increase of 12% was because of the 15% of wineries that added the feature for the first time, with only 3% dropping it. Although the overall usage of ‘Email-ordering by Form’ only altered by 1%, it did result from 9% of wineries adding the feature for the first time and 10% of wineries dropping the feature. This was a result of some wineries switching from the ‘email’ option to the ‘fax’ option. There was an overall increase of 4% in those sites that allowed direct ordering by email, this resulting entirely from wineries that added the feature for the first time. There was no general change in the level of usage of online sales, but this was because 9% of wineries added the feature for the first time and 9% of wineries dropped it. The results in this section indicate that there is still a degree of uncertainty about which way wineries are heading in relation to online ordering, with the only definable increase being in the perceived ‘safe’ option of printing out the order form and faxing it to the business.

Community

The following table (Table Six) shows the breakdown of Australian wineries in both studies that offered membership of a club or the ability to subscribe to an email list on their website.

Table Six: Percentage of Australian Wineries with Club Memberships or Mailing Lists on their Website

Classification	**Membership/ Mailing List (%)**	
	2000	**2002**
Large	33	62
Medium	42	70
Small	33	60
Micro	36	33
Hobby	19	14
Overall	**33**	**45**

Many wineries offer memberships to online communities (such as clubs) or publish regular newsletters to keep enthusiasts informed about the latest developments in aspects of their business, from crop reports to news of recent releases. Thus, there is an attempt to involve wine drinkers in the winery community. So it is hardly surprising that a substantial number of wineries have online membership and mailing lists. In the 2000 study, just 19% of Hobby wineries offered membership or mailing lists compared with over 30% for the other categories. The 2002 study saw an increased usage of this feature by the larger wineries, but still little interest from Hobby wineries (19% down to 14%). There was some volatility in the use of this feature, with 19% of wineries adding it for the first time, but 7% of wineries dropping it.

Regional Information

Many wineries see benefits through promoting the local wine region ('cluster') that they are in [14] — with the viewpoint that getting more visitors into the area will increase the chances of getting visitors to their wineries. This is often done in coordination with other wineries in the region. For this same reason, wineries will also promote the general (non wine related) attractions of the local region. Table Seven shows the percentage of wineries in both studies that had these features on their websites.

Table Seven: Percentage of Australian Wineries with Regional Information on their Website

Classification	About the 'cluster' (%)		About the Local Region (%)	
	2000	2002	2000	2002
Large	0	0	11	25
Medium	25	20	8	60
Small	19	15	10	30
Micro	7	0	7	25
Hobby	19	21	12	50
Overall	**14**	**11**	**9**	**36**

There seemed no great inclination for wineries in the two studies to mention the wine industry (that is, provide information about competitors in their own 'cluster') in the region. In fact, this had dropped from 14% to 11% across the two studies. However, in relation to providing information about the activities and attractions of the local region, there was a marked increase in this aspect from all winery categories in 2002 compared to 2000.

Sellitto and Martin [10] in their work on Victorian small and medium sized wineries found that many winery owners linked their websites to other winery websites (winery-to-winery links) and proposed that these reciprocal hypertext links promoted regional wine tourism. Moreover, the authors suggested that winery websites, although providing another avenue for wine sales, had also a quasi-tourism function that drew on the collaborative nature of the industry to promote a winery trail— the cellar door visit was facilitated and ostensibly commenced at the website with wine sales being completed at the cellar door. Our study appears to indicate that tourism information of winery websites has significantly increased since 2000 and manifested itself across all winery size types. This may be explained by the rapid diversification of wineries over the last several years to offer accommodation, food and tours as part of the cellar door experience [24].

There was some fluctuation in the provision of information 'about the cluster'. The overall decrease of 3% resulted from 4% of wineries adding the feature for the first time and 7% of wineries dropping the feature. The definite result of all came from the perceived value of putting information 'about the local region' on the website. The overall increase of 27% in the use of this feature resulted primarily from the 28% of wineries that added the feature for the first time, with only one winery dropping the feature.

Maturity in the Development in Australian Winery Websites

Table Eight summarizes some of the information provided in the earlier tables in this paper. All the website features that were compared across the two studies are listed here under their various categories. The overall usage levels (for each study) are presented, as well as the percentage of websites that introduced a feature for the first time in the second study and the percentage that dropped the feature after the 2000 study.

Initially, it is easy to identify those features that could now be regarded as 'standard' on the websites of Australian wineries. In the columns that report on the overall usage levels in the two studies, these have been shaded where at least eight out of 10 wineries use the feature. These features are:

- Information about the business
- Information about the wines
- Business contact information, including email address, physical address, telephone and fax numbers.

However, there have also been several features that some wineries have introduced that may eventually become ‘standard’. Where there is a difference of over 10% between websites that added the feature and those that dropped the feature, the increases have been highlighted in boldface text. Note there are no features where the move to drop the feature was greater than 4%. Using this analysis, possible features that may soon be considered as ‘standard’ are:

- A location map on the website
- The option to print out order forms and fax them when wishing to place an order
- Membership and/or mailing lists
- Information about the local region.

An examination of Table Eight shows the basis upon which we make our claim that the websites of Australian wineries have matured over time:

- A greater proportion of wineries implemented the vast majority of the features we have identified in the 2002 study than in the 2000 study. Where there has not been an increase, the status quo has virtually remained (the largest drop being three percent).
- For some features, there have been dramatic increases in usage
    - 27% more wineries are providing information about their local region
    - 15% more wineries are providing information about the business
    - 14 % more wineries are providing a location map
    - 12% more wineries are providing a membership or mailing list
    - 12% more wineries are providing the option for customers to order by printing out an order form and faxing it.
    - 9% more wineries are providing a news function.

Table Eight: Website Feature Fluctuations—2000 and 2002 Studies

Feature Classification		**Feature**	**Overall 2000 Usage Level (%)**	**Overall 2002 Usage Level (%)**	**% of Websites that Added the Feature**	**% of Websites that Dropped the Feature**	**% change**
Information Provision	General	About the Business	78	93	**15**	**0**	**+15**
Information Provision	General	News	57	66	18	9	+9
Information Provision	General	Press Releases	13	14	8	7	+1
Information Provision	Product	About the Wines	80	93	**14**	**1**	**+13**
Information Provision	Product	Customer Reviews	17	21	5	9	-4
Information Provision	Business Contact	Email	94	95	4	3	+1
Information Provision	Business Contact	Physical Address	95	93	3	5	-2
Information Provision	Business Contact	Telephone	92	93	3	2	+1
Information Provision	Business Contact	Fax	90	89	4	5	-1
Information Provision	Business Contact	Map	33	47	**19**	**5**	**+14**
Ordering and Sales		Print Order Form and Fax it	16	28	**15**	**3**	**+12**
Ordering and Sales		Email-ordering by Form	22	21	9	10	-1
Ordering and Sales		Order Direct by Email	1	5	4	0	+4
Ordering and Sales		Online Sales	20	20	9	9	-
Community	Membership/Mailing List		33	45	**19**	**7**	**+12**
Community	Regional	About the Cluster	14	11	4	7	-3
Community	Regional	About the Local Region	9	36	**28**	**1**	**+27**

DISCUSSION

In our previous 2000 study [11], we commented that the websites of Australian 'small' wineries appeared to be unique when compared with Australian small businesses in generally. The adoption rate of websites by Australian wineries is less than that of other Australian small and medium businesses. Australian small businesses are less likely to offer online ordering and payment facilities. However, for small, micro and hobby wineries, once they have overcome the hurdle of creating the website in the first place, they are more likely to adopt online ordering and sales than their larger counterparts. This is still the case today.

The authors extended the 2000 study to include email interviews with the owners of five of the wineries whose websites were examined [11]. A common theme emerging for the motivation behind the implementation of the website and the goal of the website was to provide information designed to educate customers about their products. As expected (from our earlier discussion) only the smaller wineries were interested in selling online.

The 2002 study has revealed some trends in the development of Australian wineries, specifically in relation to the level of information provision, features for ordering and sales, and community related features.

Information Provision

There was an increase from the 2000 study to 2002 in virtually all the categories of information provision that we identified. The other categories of information provision remained reasonably constant (the biggest decrease was two percent). Significantly, 15% more businesses (93% in 2002) provided information 'about the business'—which can be important when building a brand. In line with this, wine tourism information appears to have become an important feature for wineries to provide on their websites. Many more businesses (47% - an increase of 14%) provide location maps to simplify the process of customers getting to their winery. A major increase was that many more wineries in all categories are providing information about activities and attractions in the local region (36% - up 27%). Other features that have been introduced might have been included to encourage extra visitors to the winery. This is consistent with the goal of provision of information and education of the customer in winery related matters. It also points to an awareness on the part of winery operators to provide 'tailored' information— which in this instance aims at encouraging customers to visit a region, providing them directional information on how to travel to the winery. On a more surprising note it is interesting to observe that across **both** studies there were still a small number of wineries (around one in ten) that did *not* provide important contact information such as physical location, email address, telephone or fax number.

Ordering and Sales

More wineries in all categories, from hobby to large, offered the chance for customers to purchase their offerings over the Internet (43% - up 5%). However, this was not generally achieved by using an interactive sales feature, but by providing a request form for customers to print out and fax back to the winery (this option was up 12%). The interactive sales feature was used by 20% of wineries in both the 2000 and 2002 study. However, it was found that the number of wineries that dropped the interactive sales feature (9%), was counterbalanced by a similar number that adopted the feature. Most of those that dropped interactive online sales adopted the more traditional form of allowing customers to print out the order form and fax it. As expected (from the 2000 study and an understanding of the WET rebate) this remained the domain of the smaller wineries. This may alter, although unlikely, with recent changes to WET rebate scheme.

Community

More of the large, medium and small wineries are providing clubs or membership lists for members to participate in (generally 45% of wineries provided this feature—up 12%). These provide the community benefits mentioned earlier.

FURTHER RESEARCH

Generally, it seems that there is some maturity developing in the websites of Australian wineries. Our conjecture is that this reflects an improved understanding of how the websites can enhance their business. Some information (such as contact information, location etc.) rarely changes and is included because it helps attract customers to the business and the area, with information on how to locate them. Smaller wineries should offer sales of some form on their websites in an endeavour to take advantage of the WET rebate. A conservative approach is to provide an order form that customers can print out and fax. Other simple options are customers ordering by a web form that sends an email (which can be encrypted) to the business or by prompting the customer to email the business with the order details (less secure). If they are comfortable with the technology, businesses can provide an online sales option, with ‘on the spot’ credit card approvals. This is more costly to set up, but there are third parties who can arrange this. Options such as membership and mailing lists are becoming popular on winery websites, but these require some effort to set up and to maintain. The reward is that there is a possibility of enhancing customer loyalty by providing added value for group or membership list members.

The next stage in our research is to identify and interview the employees in wineries charged with the task of website content management to determine if these are the actual reasons for adopting the content. A more important objective would be to determine how the website fits in with the overall business strategy.

CONCLUSION

This paper reported on a longitudinal study (over a two-year period) of the features of websites of Australian wineries at a ‘micro’ level. It revealed that there has been development, at a general level, of many of those websites. Whilst information based sites were common in both studies, there was an increase in the number of sites offering information about the business and their wines, location maps and general regional information in the latter study. Other features that became more common were the creation of membership clubs and/or mailing lists and the use of the ‘print order form and fax it’ option as a method, especially for the smaller wineries, to encourage direct sales through their websites. This latter feature highlighted a distinction between the larger and smaller wineries in both studies. The larger wineries tended to rely more upon sales through their distributors instead of their websites, and thus had very few ‘direct’ ordering options. The smaller wineries, perhaps encouraged by the WET rebate, tended to offer purchase options directly through their websites.

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