

## **The perceived importance of the features of wine regions and wineries for tourists in wine regions**

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### **Abstract**

The objective of this study is to identify the salient features of wineries and wine regions, from the perspective of a potential Israeli visitor. This insight facilitates an understanding of the features that might influence the decision to visit a winery or wine region, and enables operators to develop varied wine tourism products, combined with other attractions and activities. An exploratory study has been conducted and included 373 valid questionnaires of adult Israeli residents. The questionnaires included a list of 42 winery and wine region features, based on previous literature and preliminary semi-structured interviews. Participants were asked to rate the importance of each feature with respect to their decision to visit wineries or wine regions (on a 1-5 Likert-type scale). Factor analysis technique was implemented resulting in nine factors, representing different dimensions of the wine tourism experience, and explained 62.34% of the total variance. Factor scores were calculated and used for comparisons between different segments. The findings indicated that different segments yielded different importance ratings for each dimension. Fundamental differences occurred among specific segment bases: winery visitation frequency, marital status and age. Results show that the motivations for choosing a wine region as a tourist destination go beyond a simple desire to experience wine. A tourist's decision to visit a specific winery is also shaped by the willingness to experience the region's features and to participate in other activities or attractions during the visit.

## Introduction

Wine tourism is an ongoing developing research topic, and it has become important for both academics and the wine industry. This trend might not be surprising, in the light of its major importance to growth and success of many small wineries. Significant advantages were driven from visits to wineries, particularly with respect to small wineries: an opportunity to try new product, build brand loyalty, increase margins, additional sales outlet, marketing intelligence and a means of educating consumers about wine (Dodd 1995). Apart from its contribution to wineries, wine tourism was proved to be an important element in the tourism industry, followed by economic development investments, which occurred thanks to the establishment and increasing number of new wineries and cellar doors (Sanders, 2004). Other studies indicated that wine tourism is an initiator for regional development, attracts new investments to the region and increases regional employment and tourism (Carlsen, 2004, Jaffe and Pasternak, 2004).

Traditionally, wine tourism was focused on tourists motivated primarily by an interest in wine and with a strong desire to visit the places related to tasting and buying wine. Wine tourism was initially defined by Hall (1996) and Hall and Macionis (1998) as '*visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and or experiencing the attributes of a grape wine region are the prime motivation for visitors*'. This definition emphasizes wine and wine-related activities as the main motives for visiting wine regions. For the tourism industry, wine was an important factor in attracting tourists to visit regions where wineries are located. This implies that wine tourism should include more than a simple visit to wineries or vineyards.

Carlsen (2004) recently reviewed global wine tourism research and noted that many wine regions and tourism destinations have realized that the benefits of wine tourism extend beyond the cellar door and contribute to the attractiveness of the region. He pointed out the contemporary definition of wine tourism given in 1998 by the Winemakers' Federation of Australia (2002) as '*visitation to wineries and wine regions to experience the unique qualities of contemporary Australian lifestyle associated with the enjoyment of wine at its source – including wine and food, landscape and cultural activities*.' Their vision is to be '*an integral part of the Australian tourism image and experiences through the enjoyment of wine, food and other associated activities*'. This approach increased the studies in a range of focuses in wine tourism from the tourists' perspective, as most previous research was conducted on the supply-side issue, from the perspective of wineries, without an in-depth explanation of the demand perceptions and opinions (Hall *et al.* 2000).

The Canadian Ministry of Tourism (2007a,b) conducted a survey in Canada and the USA between 2004-2006. The main purpose of the survey was to assess the travel activities and motivators of pleasure travel associated with cuisine and wine among Canadians and Americans (18 years or older). The survey conducted by phone and return mail consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires in Canada. The U.S. survey consists of 60,649 completed responses by return mail only. The survey examines out-of-town travel behavior of one or more nights over a two-year period and provides detailed information on travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns. Although a majority of travelers (over 70% of respondents) engaged in wine- and cuisine-associated activities while on trips, only 16% of Canadians and 17% of the Americans reported that these activities as the main reason for taking at least one of their trips. Hence, wine tourism should engage other activities in the region.

Wine tourism experiences are much more than merely drinking wine or enjoying the experience of wine (Charters and Ali-Knight 2002, Charters and Ali-Knight 2000, Dodd 1995, Mitchell and Hall 2004, Hall *et al.* 2000). It is often part of an overall 'bundle-of-benefits' that includes not only visiting wineries and/or tasting wine, but also visiting the area, enjoying scenery and visiting other local attractions. Charters and Ali-Knight (2002) provided an example of the Champagne region in France that has a wide 'bundle of benefits' such as heritage buildings, historical sites, restaurants and attractive landscapes as well as a range of wine-tourism experiences which are offered by wine producers, such as visiting wineries, wine museums and underground caves used to age the wine. Getz *et al.* (1999) studied the factors that are most important in developing wineries and destinations for wine tourism from the supply perspective. They used surveys that were distributed to delegates attending wine tourism conferences and workshops in Australia and in Washington State in the USA. They suggested that in terms of the supply side, the success factors for wine tourism included 'wine routes or trails, well sign posted', 'a strong tourism marketing organization', 'maintaining a consistent, wine-related image', 'wine festivals and related special events' and 'fine dining or gourmet restaurants' (there was a minor difference between the ranking of the Australian and American respondents on these items, but significant differences did not exist). They concluded that key developmental factors for wine tourism should include the above factors as well as joint marketing efforts involving the wine and tourism industries.

In a working paper presented at the Third International Wine Business Research Conference in Montpellier (Carlsen, Getz, and Willcock 2006), the authors focused on young wine tourists and pointed out that wine was not the exclusive reason for young wine tourists in their trip to Margaret River, and the other attractions such as beaches and forests were important as well. They concluded that 'the tour guide', 'the food', 'the wineries visited', 'the length of the tour', 'the wine tasted' and 'the information received about Margaret River and the area' were the most important to the respondents for their overall satisfaction. This study indicates that many other factors influence tourist satisfaction other than the wine drinking or tasting. Getz (2000) concluded that the association of wine tourism with successful integration of consumer experience, suppliers and the destination marketing/management organizations is important for successful wine tourism. A later study by Getz and Brown (2006) suggests that a wine region, as a travel destination, should offer more than a simple presence of vineyards and wineries. They concluded that wine tourism experience includes three major critical features: wine-related features, destination features (such as attractive scenery and pleasant climate) and cultural activities (such as unique accommodation and fine dining and gourmet restaurants).

Several studies suggest several stages of the tourism experience: 'pre-visit', 'travel-to', 'on-site', 'travel-from' and 'post visit'. Mitchell and Hall (2004) summarized the wine experience and business opportunities across all five phases of the tourist experience. They identified a range of positive post-visit behavior among winery visitors and concluded that visitors to wineries are encouraging others to try the brand, either through a visit or a purchase of the winery's wine. Mitchell and Orwig (2002) suggested 'consumer experience tourism' that provides the consumer an experience regarding a product, its production process and historical significance. Hence, the bond between the consumers and brands may be strengthened by the availability of the consumer experiences and enhance brand loyalty.

Most wine tourism studies have been conducted among visitors within cellar doors, after ending a winery visit, during wine festivals or among wine club members (e.g. Mitchell and Hall 2001, Cullen *et al.* 2006, Charters and Ali-Knight 2000). Such surveys have practical advantages: the ability to evaluate the winery and service experience and likewise to determine levels of satisfaction (Getz and Brown 2006). However, they miss the possibility of examining behavior and perceptions of non-visitors. This part of population might include, for example, a young

generation of wine drinkers, who do not necessarily visit wineries or cellar doors, but might become the next generation of wine tourists. Moreover, it is possible that non-visitors (or even people who have not visited a winery before) might be potential wine tourists, and hold different views than actual wine tourists.

To develop and market wine destinations and wine tourism products, it is essential to understand who winery visitors are, by understanding their perception regarding the important attributes within wineries and wine regions, which might include a wide range of attractions and activities. The purpose of this study is to explore the important features of wineries and wine regions according to the perception of potential Israeli visitors, which might influence their decision to visit wineries or wine regions. This insight may provide managerial and marketing tools for wineries and wine regions.

## **Method**

A questionnaire was designed and developed after discussion with 28 potential visitors (over the age of 18) and was tested with a small number of interviewees as a pilot study. A list of 42 attributes related to wineries and wine regions were included in the questionnaire, based on Getz and Brown's (2006) study and preliminary semi-structured interviews. Participants were asked to rate each attribute's importance in terms of their own perceptions (on a Likert-type 1-5 scale).

The questionnaire included demographic questions such as gender and age and behavioral questions such as frequency of visiting wineries and drinking wine, and the source of information being used for their visits, if they have visited wineries. The data was collected in Israel between December 2006 and February 2007, on trains leaving from Tel Aviv, Beer Sheva, Haifa, Jerusalem and other main train stations in Israel. This allowed us to interview subjects living in different regions of Israel. Out of 373 valid questionnaires, 158 (44.4%) were male and 198 (55.6%) female (there were missing data in questionnaires). Only subjects aged 18 and older participated in the survey. Eighty six of the respondents (24.4%) were between 18-24, 125 (35.4%) between 25-34, 58 (16.4%) between 35-44, 45 (12.8%) between 45-54, and 39 (11.0%) over the age of 54 (there were questionnaires with missing data). Income levels were classified in three categories: 152 respondents (42.4%) earned below the average income in Israel, 103 (28.8%) earned about the average, and 103 (28.8%) earned above the average. The high percentage of average and below average income reflects the young age of the respondents. Approximately 61.2% of the subjects are college graduates or are currently studying at universities or colleges, and 47.2% of the subjects were married and 31.2% of the subjects have children younger than 18. Out of all respondents, 139 (37.5%) have visited wineries at least once during the last two years, 167 (45.0%) had visited wineries, but not during the last two years, and 65 (17.5%) of them have never visited wineries. Fifty-eight respondents live in Jerusalem (15.6%), 43 in Tel Aviv (11.5%), 43 Beer Sheva (11.5%) and 21 Haifa (5.6%). All other respondents live in 120 different locations in Israel.

## **Results**

The average levels of importance of the features are presented in Table 1 in the order of importance (the list of features in the order of presentation is presented in Appendix 1). The most important attribute was "the winery offers wine tasting" (average score of 4.26 out of 5.0) followed by "I'll receive info about the wine making" (4.22), and "there is a special atmosphere in the winery" (4.08). These three attributes are concerned with the wine tasting and wine making, and also the special atmosphere in the winery. The next features that are of relatively high

importance to the respondents were "there is a cellar door tour" (average importance 4.05) and "the winery staff is polite and pleasant" (average importance 4.04). No significant differences were found among these five attributes, and all of them are somehow of similar importance. It is obvious that the features of less importance are wine region attributes such as "close to my home", "there are many wineries to visit", "there are shops which offer special arts or handicrafts" and more (see Table 1). The least important feature is "there are high quality sports facilities" (average importance 1.80).

Marketers use market segmentation to target different products to different segments to increase sales and fit different products to specific segments. The data collected in this study enables segmentation of the data using demographic variables and other personal data. We used gender, frequency of visiting wineries and having children younger than 18 living at home for the segmentation. The ranking order of the top 10 features that were perceived of highest importance is presented in Table 2 for the whole sample of subjects and for the different segments.

In general, rankings of each segment are somewhat similar to the overall sample with minor variations. For gender segments, the most important features are almost the same as the overall sample. However, it is possible to see some differences in the importance of the features. Wine tasting (#19) and information about making wine (#14) appear in the top 10 features in all segments, but in different locations. For people who visited wineries at some time, but not during the past two years and for those who had never visited wineries, the most important issue is the 'information about the process of wine making'. They believe that the winery tour has added value to the knowledge of the process of wine making, since they are able to see the equipment and facilities that are used for the processing of wine. For those who had visited wineries during the last two years, the staff and their knowledge are of high importance (4.01) and appear in position seven of the overall ranking. For people who visited wineries but not over the past two years this feature appears in position 13 with relative importance of 3.79 (not shown in the table), and for the third segment, people who had never visited wineries, it has only 3.40 average mean score, and it is in position 21. The internal appearance of the winery (feature 5) appears in position 5 for the segment that contains subjects who visited wineries during the last two years with importance score of 4.13, ranked higher than for the overall sample (position 7, importance 3.94). For the next segment, people who visited wineries two years earlier, this feature is in position 7 and has an importance of 3.98, almost the same as for the whole sample.

Comparing people who have children with those who do not have children show that the features dealing with family activities (#41 and #42) have a high importance for the people who have children (relative importance 3.96 and 3.91, positions 8 and 10, respectively), while for the people without children these features appear in position 22 (for #41), with an importance score of 3.37 and position 16 (for #42) with average score of 3.64.

It is not straightforward to see similarities and differences and to discriminate among segments using simple statistical analysis such as comparing means. To detect the underlying dimensions of the participants' perceptions of the wine regions, their perception ratings were subjected to a principal component-based factor analysis. Factors with eigenvalues greater than 1 were extracted and rotated using the Varimax method to form an orthogonal structure. Nine factors, accounting for 62.35% of the total variance, were extracted from the data. The attribute "close to my home" was omitted from the factor analysis due to its low theoretical and practical importance (its contribution to the total variance was very small). Cronbach Alpha reliabilities were calculated for the factors which were reliabilities ranged between .65 and .86.

**Table 1:** Mean scores of perceived importance of wine tourism features

#	Feature	Mean	SE
19	The winery offers wine tasting	4.26	0.054
14	I'll receive info. about the wine making process	4.22	0.051
7	There is a special atmosphere in the winery	4.08	0.052
17	There is a cellar door tour	4.05	0.055
4	The winery staff is polite and pleasant	4.04	0.060
29	The weather is comfortable for visits	3.95	0.054
5	The internal appearance of the winery	3.94	0.057
28	There is a beautiful scenery	3.94	0.056
15	I'll receive info. about combining wine with food	3.88	0.057
38	The region is quiet and calm	3.82	0.056
3	The winery staff is very familiar with wine	3.80	0.068
39	The quality of the environment (such as place without air pollution )	3.79	0.066
6	The road access to the winery is convenient for visitors	3.74	0.063
11	I'll have the opportunity to talk to wine maker	3.73	0.063
13	I'll receive info. about the winery	3.73	0.058
42	I can spend time with my friends at attractions/activities located in the region	3.73	0.060
18	There is a vineyard door tour	3.67	0.059
16	I'll have the opportunity to make wine	3.62	0.067
27	The roads are well signed	3.59	0.066
12	I'll receive info. about the winery's region	3.57	0.062
41	I can spend time with my family at attractions/activities located in the region	3.56	0.066
8	The winery has a great reputation	3.52	0.063
35	There are shops/markets which offer local farm produce for sale	3.33	0.066
26	It's easy to obtain tourist info. about the region	3.30	0.068
30	There are restaurants with unique menu	3.27	0.067
23	The region has a strong reputation as wine growth region	3.26	0.067
10	There is a restaurant in the winery	3.25	0.069
20	The winery offers children's activities	3.11	0.081
36	Wine museum	3.07	0.068
34	Wine festivals are held in the region	3.00	0.071
9	You can visit the winery on an organized tour	2.95	0.073
40	Archeology sites to visit in the region	2.94	0.067
37	Artistic performance or concerts in the region	2.92	0.071
32	A wide range of children's attractions/activities	2.87	0.077
1	You can purchase special wines you cannot obtain in wine stores	2.87	0.076
24	There are many wineries to visit at	2.72	0.067
31	There are shops which offer special arts or handicrafts	2.51	0.067
21	The region is close to my home	2.46	0.070
22	The region is popular among Israeli visitors	2.40	0.068
2	You can purchase complementary wine accessories	2.34	0.065
25	I am familiar with at least one winery	2.30	0.067
33	There are high quality sports facilities	1.80	0.055

**Table 2:** Perceived importance of wine tourism features by segments

a All subjects (n=373)			c2 Visited wineries before last 2 years (n=167)		
#	Feature	mean	#	Feature	mean
19	The winery offers wine tasting	4.26	14	I'll receive info. about the wine making process	4.28
14	I'll receive info. about the wine making process	4.22	19	The winery offers wine tasting	4.23
7	There is a special atmosphere in the winery	4.08	17	There is a cellar door tour	4.13
17	There is a cellar door tour	4.05	7	There is a special atmosphere in the winery	4.13
4	The winery staff is polite and pleasant	4.04	29	The weather is comfortable for visits	4.01
29	The weather is comfortable for visits	3.95	4	The winery staff is polite and pleasant	3.98
5	The internal appearance of the winery	3.94	5	The internal appearance of the winery	3.98
28	There is a beautiful scenery	3.94	28	There is a beautiful scenery	3.95
15	I'll receive info. about food and wine	3.88	15	I'll receive info. about combining wine with food	3.86
38	The region is quiet and calm	3.82	11	I'll have the opportunity to talk to wine maker	3.83
b1 Male (n=158)			c3 Not visited wineries (n=65)		
#	Feature	mean	#	Feature	mean
14	I'll receive info. about the wine making process	4.27	14	I'll receive info. about the wine making process	4.05
19	The winery offers wine tasting	4.25	28	There is a beautiful scenery	3.94
17	There is a cellar door tour	4.14	29	The weather is comfortable for visits	3.94
7	There is a special atmosphere in the winery	4.03	39	The quality of the environment	3.92
4	The winery staff is polite and pleasant	3.99	19	The winery offers wine tasting	3.86
5	The internal appearance of the winery	3.96	15	I'll receive info. About food and wine	3.86
28	There is a beautiful scenery	3.96	17	There is a cellar door tour	3.86
29	The weather is comfortable for visits	3.94	38	The region is quiet and calm	3.77
39	The quality of the environment	3.94	4	The winery staff is polite and pleasant	3.74
15	I'll receive info. About food and wine	3.90	7	There is a special atmosphere in the winery	3.66
b2 Female (n=198)			d1 Have children under 18 years (n=116)		
#	Feature	mean	#	Feature	mean
19	The winery offers wine tasting	4.28	14	I'll receive info. about the wine making process	4.32
14	I'll receive info. about the wine making process	4.14	19	The winery offers wine tasting	4.29
7	There is a special atmosphere in the winery	4.09	17	There is a cellar door tour	4.24
4	The winery staff is polite and pleasant	4.05	7	There is a special atmosphere in the winery	4.17
17	There is a cellar door tour	3.94	5	The internal appearance of the winery	4.05
29	The weather is comfortable for visits	3.94	4	The winery staff is polite and pleasant	4.03
28	There is a beautiful scenery	3.91	28	There is a beautiful scenery	3.97
5	The internal appearance of the winery	3.90	41	I can spend time with my family at attractions/activities located in the region	3.96
15	I'll receive info. About food and wine	3.84	29	The weather is comfortable for visits	3.93
3	The winery staff is very familiar with wine	3.82	42	I can spend time with my friends at attractions/activities located in the region	3.91
Visited wineries at least once during last 2 years (n=139)			d2 Have no children under 18 years (n=256)		
#	Feature	mean	#	Feature	mean
19	The winery offers wine tasting	4.48	19	The winery offers wine tasting	4.24
4	The winery staff is polite and pleasant	4.25	14	I'll receive info. about the wine making process	4.17
7	There is a special atmosphere in the winery	4.24	4	The winery staff is polite and pleasant	4.04
14	I'll receive info. about the wine making process	4.24	7	There is a special atmosphere in the winery	4.04
5	The internal appearance of the winery	4.13	17	There is a cellar door tour	3.96
17	There is a cellar door tour	4.04	29	The weather is comfortable for visits	3.95
3	The winery staff is very familiar with wine	4.01	28	There is a beautiful scenery	3.93
28	There is a beautiful scenery	3.93	5	The internal appearance of the winery	3.89
15	I'll receive info. About food and wine	3.91	15	I'll receive info. About food and wine	3.87
13	I'll receive info. about the winery	3.89	38	The region is quiet and calm	3.85



Table 3 summarizes the results of the factor analysis. The rotated factor structures and the item loadings are presented in Table 4 (only factor loadings above .3 are presented). The nine factors derived from the data can be interpreted as representing core features, and they are as follows: (1) Winery atmosphere; (2) cultural activities; (3) family activities; (4) environmental features; (5) familiarity and reputation; (6) information in winery; (7) exploratory activities; (8) purchasing special wine and accessories and (9) access the region.

**Table 3:** Eigenvalues and percentage of variance explained

Factor	Eigenvalues	% of Variance explained	Cumulative %
1	9.152	22.32	22.32
2	4.120	10.05	32.37
3	2.573	6.27	38.64
4	2.150	5.24	43.89
5	1.950	4.76	48.64
6	1.747	4.26	52.91
7	1.446	3.53	56.43
8	1.247	3.04	59.47
9	1.178	2.87	62.35

Factor 1, the "winery atmosphere" contributes 22.32% to the total variance and includes five features that describe the winery atmosphere: "the winery's internal appearance" (average importance 3.94 out of 5), "the winery staff is polite and pleasant" (4.04), "the road access to the winery is convenient for visitors" (3.74), "there is a special atmosphere in the winery" (4.08) and "the winery staff very familiar with the wine" (3.80). The factor loading of each of the 5 features is above .6. This factor contains unique winery features and service-oriented features as well as the access to the winery (Table 4).

Factor 2 "cultural activities" includes seven features: "there are shops which offer special arts or handicrafts" (importance 2.51), "there are restaurants with unique menus within the region" (3.27), "there is a restaurant in the winery" (3.25), "artistic performance or concerts in the region" (2.92), "there are shops or markets which offer local farm produce for sale" (3.33), "there are high quality sports facilities within the region" (1.80), "wine festivals are held in the region" (3.00). This factor presents the necessity of adding products and activities to the visit to a winery. Visitors are looking for special experiences in the region such as special restaurants, shops or markets that provide local farm products, wine festivals and sports activities. From a marketing perspective, marketing wine tourism should include regional and cultural activities in the region, beyond winery visits. Although the feature "there are shops which offer special arts or handicrafts" has only 2.51 average importance and placed 37 in the overall ranking of the features, its factor loading is high .755 (see Table 4). The last two features "there are high quality sports facilities within the region" and "wine festivals are held in the region" have factor loading of less than .5. Wine festivals seem to be an important feature for the subjects, as compared to

sports activities, which were ranked the lowest of all features. In other words, sport activities are not important by themselves, but offer added value to other activities in the region.

**Table 4:** Factor loadings of wine tourism features (only factor loadings above .3 are presented)

	Factor # →	1	2	3	4	5	6	7	8	9
5 The internal appearance of the winery		0.819								
4 The winery staff is polite and pleasant		0.736								
6 The road access to the winery is convenient for visit		0.735								0.303
7 There is a special atmosphere in the winery		0.726								
3 The winery staff is very familiar with wine		0.620							0.429	
31 There are shops which offer special arts or handicrafts			0.755							
30 There are restaurants with unique menu			0.729							
10 There is a restaurant in the winery		0.301	0.662							
37 Artistic performance or concerts in the region			0.612							
35 There are shops/markets which offer local farm produce for sale			0.583							
33 There are high quality sports facilities			0.486	0.457						
34 Wine festivals are held in the region			0.433			0.317			0.367	
32 A wide range of children's attractions/activities				0.820						
20 The winery offers children's activities				0.799						
41 I can spend time with my family at attractions/activities located in the region				0.729						
42 I can spend time with my friends at attractions/activities located in the region				0.591	0.345					
38 The region is quiet and calm					0.730					
39 The quality of the environment (such as place without air pollution )					0.689					
29 The weather is comfortable for visits					0.679					
28 There is a beautiful scenery					0.679					
40 Archeology sites to visit in the region					0.434					
25 I am familiar with at least one winery						0.720				
24 There are many wineries to visit at						0.708				
23 The region has a strong reputation as wine growth region						0.646				
22 The region is popular among Israeli visitors						0.611				
8 The winery has a great reputation		0.501				0.514				
12 I'll receive info. about the winery's region							0.848			
13 I'll receive info. about the winery							0.813			
14 I'll receive info. about the wine making process							0.550	0.509		
11 I'll have the opportunity to talk to wine maker							0.438	0.410		
36 Wine museum			0.320			0.351	0.434			
16 I'll have the opportunity to make wine									0.710	
15 I'll receive info. about combining wine with food									0.603	
18 There is a vineyard door tour									0.583	
17 There is a cellar door tour							0.379	0.561		
19 The winery offers wine tasting								0.478	0.411	
1 You can purchase special wines you cannot obtain in wine stores									0.711	
2 You can purchase complementary wine accessories									0.622	
27 The roads are well signed										0.713
26 It's easy to obtain tourist info. about the region					0.320	0.321				0.578
9 You can visit the winery on an organized tour										0.409

The "family activities" (factor 3) explains only 6.27% of the variance, but has vital importance for families with children. Consequently family and children's activities are essential for family visits to the region. This factor contains four items: "a wide range of children's attractions/activities in the region" (2.87), "the winery offers children's activities" (3.11), "I can spend time with my family by engaging in attractions/activities within the region" (3.56) and "I can spend time with my friends by engaging in attractions/activities within the region" (3.73).

Factor 4, environmental features, describes the unique features of the region and consists of five features: "the region is quiet and calm" (3.82), "the quality of the environment" (3.79), "the weather is comfortable for visiting" (3.95), "there is beautiful scenery" (3.94) and "tourist archeological sites in the region" (2.94). Visitors want to visit wineries in regions with beautiful views and scenery that are quiet and calm without air pollution. Weather is an important factor for visits, since visitors prefer a package of activities beyond the winery visit, including outside activities.

The remaining five factors contribute less than 18.5% to the total explained variance, while each of the factors contributes less than 5.0% (see Table 3). Factor 5 represents the familiarity and reputation of the winery, and the reputation and popularity of the region as a wine growth region. It further highlights the link between the winery and the wine growth region. Factors 6 and 7 represent activities in the winery. While factor 6 characterizes the information about the winery history and the region, factor 7 includes more experimental activities in the winery such as making wine, wine tasting and cellar door tour.

Special consideration should be given to factor 8 (purchasing special wine and accessories) and factor 9 (access to the region). Purchasing special wines has .71 factor loading and purchasing accessories .62. Their relative importance scores are 2.87 and 2.40 (Table 1), respectively, and they are ranked low in the overall sample. A possible explanation for the low perceived importance is that most of the special wines in Israel can be found in wine stores as they are opening up around the country. The most important feature in factor 9 is "the roads are well signed", with a loading score of .71, but "it's easy to obtain tourist information about the region" and the possibility visiting the winery on an organized tour is also important. As Israel is a 'developing wine market', with a high number of lower knowledge consumers and many small wineries opening every year, ease of access to the wineries is essential.

Comparing segments is essential for managers and marketers to discover differences and develop an effective marketing plan to target potential customers. To that end, we used two-dimensional plots of the factor scores for the segments (Figures 1 and 2) of the first three factors, namely "winery atmosphere", "cultural activities" and "family activities". Figure 1 presents the "winery atmosphere" versus "cultural activities". The main differences are between people who have never visited winery and those who visited wineries over the past two years. While the latter perceive the winery atmosphere as an important factor in the visit, the opposite is true for those who never visited wineries, who prefer cultural activities. This is not surprising given that the people who had recently visited wineries (during the past two years) are looking for the "experience" in the winery, including gaining more knowledge about wine with a special atmosphere in the winery, and friendly staff. People who had never visited wineries were probably not aware of the experience of the winery visit and prefer special restaurants and other activities as well as wine festivals in the region. This is an important issue in terms of marketing.

Marketing only a winery for a visit will not attract new potential visitors. It seems that marketers should focus on the region, proposing a bundle of attractions and activities beyond the winery tour. Women prefer winery atmosphere compared to the whole sample, while men are on the opposite side of the scale (see Figure 1).

**Figure 1:** Factor loading of factors 1 and 2

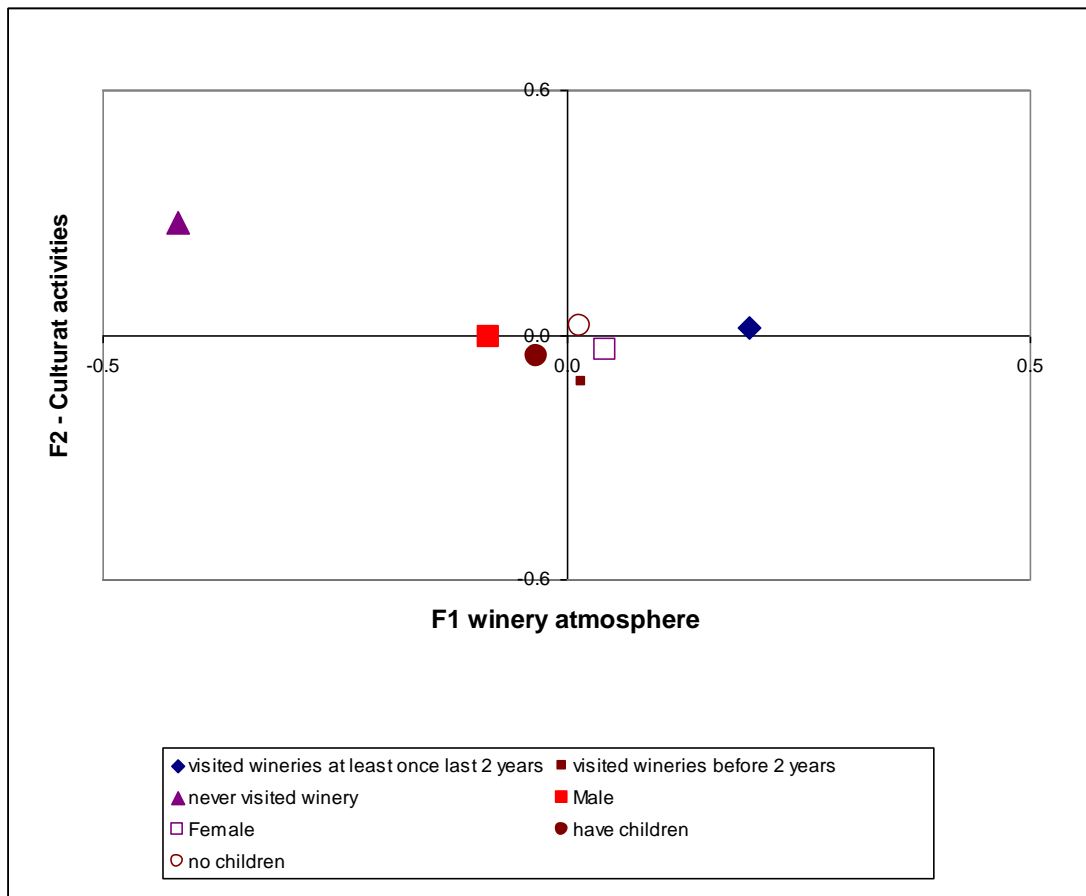
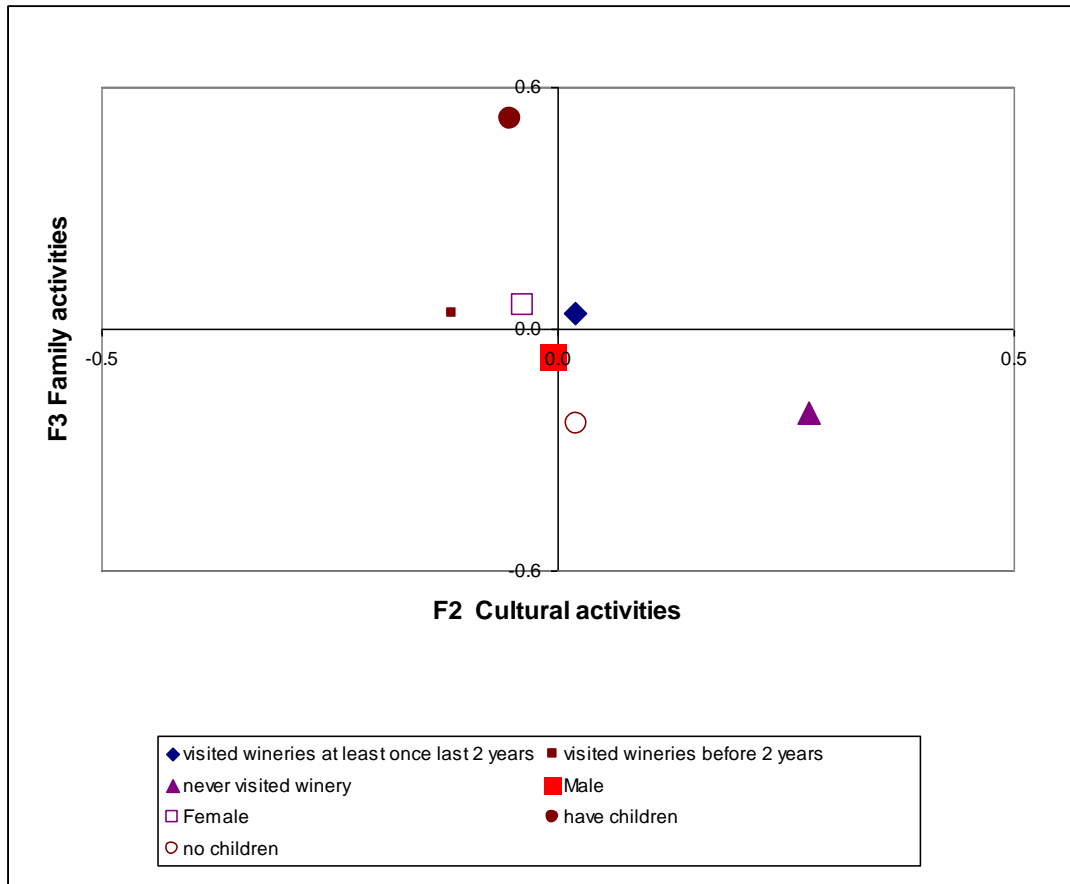


Figure 2 presents the "family activities" as the Y axis versus the "cultural activities". It is clear that people with children have a strong preference for family activities that include children's activities both in the region and at the winery, and they would like to spend time with family or friends by engaging in activities within the region. No significant difference was found between men and women.

**Figure 2:** Factor loading - factors 2 and 3



## Conclusions

This study highlights the wine tourism features that are perceived as important to different segments of potential wine tourists. Respondents were asked to rate 42 features of wineries and wine regions on a scale of 1-5, where 1 is low importance and 5 is high importance. The features perceived as most important by the respondents were activities related to the winery such as information on wine making, wine tasting, winery tour and more. Implementation of factor analysis to the data yields nine factors that explain 62.35% of the variance and can be interpreted as representing core activities. The most important factors are 'winery atmosphere', 'cultural activities', 'family activities' and 'environmental features'. Subjects who had never visited wineries prefer cultural activities such as special shops, special restaurants, artistic performances or concerts in the region. These respondents perceived the 'winery atmosphere' negatively compared to those who had visited wineries at least once. Another interesting finding is that families with children perceive 'family activities' as of high importance compared to visiting wineries or cultural activities.

The findings of this study are important in constructing a marketing strategy for wineries or wine regions to target a similar consumer segments to that which participated in this study. Marketing efforts should be target oriented, to attract potential visitors to the winery regions, and should emphasize the core features for each segment, such as winery atmosphere, activities associated with food and wine, children's activities and more. The wineries can build alliances with other tourist attractions, hotels, restaurants and other facilities in the region and offer a 'bundle of activities' for different segments of visitors such as families with children, wine consumers who like special wines, tourists who have never visited wineries and others. Wineries can attract potential wine consumers with special features in the winery and generate consumer loyalty to the wineries and their wines. Hotels, restaurants and other facilities in the region can coordinate with the wineries to establish 'wine tours' in the region. Marketers can tailor marketing strategies that are more targeted and therefore more efficient to both potential visitors, wineries and other facilities in the region.

As most studies on wine tourism focus on tourists who have visited wineries, the current study focuses on potential visitors and introduces a framework for future studies that can focus on perception of features during and post-visit of visitors. Israel, as an emerging wine market with an increasing number of wineries, the Israeli wineries with collaboration of tourist attractions in the region might benefit greatly from understanding wine tourism features that most influence potential visitors.

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Appendix 1: Features and mean scores of perceived importance in the order of presentation in the questionnaire

#	Feature	Mean	SE
1	You can purchase special wines you cannot obtain in wine stores	2.87	0.076
2	You can purchase complementary wine accessories	2.34	0.065
3	The winery staff is very familiar with wine	3.80	0.068
4	The winery staff is polite and pleasant	4.04	0.060
5	The internal appearance of the winery	3.94	0.057
6	The road access to the winery is convenient for visitors	3.74	0.063
7	There is a special atmosphere in the winery	4.08	0.052
8	The winery has a great reputation	3.52	0.063
9	You can visit the winery on an organized tour	2.95	0.073
10	There is a restaurant in the winery	3.25	0.069
11	I'll have the opportunity to talk to wine maker	3.73	0.063
12	I'll receive info. about the winery's region	3.57	0.062
13	I'll receive info. about the winery	3.73	0.058
14	I'll receive info. about the wine making process	4.22	0.051
15	I'll receive info. about combining wine with food	3.88	0.057
16	I'll have the opportunity to make wine	3.62	0.067
17	There is a cellar door tour	4.05	0.055
18	There is a vineyard door tour	3.67	0.059
19	The winery offers wine tasting	4.26	0.054
20	The winery offers children's activities	3.11	0.081
21	The region is close to my home	2.46	0.070
22	The region is popular among Israeli visitors	2.40	0.068
23	The region has a strong reputation as wine growth region	3.26	0.067
24	There are many wineries to visit	2.72	0.067
25	I am familiar with at least one winery	2.30	0.067
26	It's easy to obtain tourist info. about the region	3.30	0.068
27	The roads are well signed	3.59	0.066
28	There is a beautiful scenery	3.94	0.056
29	The weather is comfortable for visits	3.95	0.054
30	There are restaurants with unique menus	3.27	0.067
31	There are shops which offer special arts or handicrafts	2.51	0.067
32	A wide range of children's attractions/activities	2.87	0.077
33	There are high quality sports facilities	1.80	0.055
34	Wine festivals are held in the region	3.00	0.071
35	There are shops/markets which offer local farm produce for sale	3.33	0.066
36	Wine museum	3.07	0.068
37	Artistic performances or concerts in the region	2.92	0.071
38	The region is quiet and calm	3.82	0.056
39	The quality of the environment (such as place without air pollution)	3.79	0.066
40	Archeology sites to visit in the region	2.94	0.067
41	I can spend time with my family at attractions/activities located in the region	3.56	0.066
42	I can spend time with my friends at attractions/activities located in the region	3.73	0.060