SIMILARITIES AND DIFFERENCES BETWEEN PURCHASERS' AND NON-PURCHASERS' OF WINE AT THE VISITOR CENTRE (REFEREED)

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Abstract

There have been a number of industry research projects into wine tourism that have developed a profile of the wine tourist, in terms of demographics, how many visits, where they stay, international/national etc. etc (Morris and King 1997; anon. 2000; anon. 2001). Very little research has attempted to study the link between the profile of the wine tourist, their attitude to the winery visitor centre and actual purchase of wine. Small winery visitor centres (ie. small wineries) need to know if the aim should be for 1) a retail shop to sell more wine; 2) a tourist experience that leads to more indirect wine sales, or; 3) a revenue generating tourism experience. This paper provides more information to help clarify such decisions by studying the relationship between tourism liking and actual direct wine purchase at the cellar door (winery visitor centre).

The research design comprised a questionnaire self completed by the actual winery visitor, across five cellar doors (winery visitor centres) in two states (South Australia and Victoria). The questionnaire was completed over a week in January 2002. The questionnaire included sections asking for the demographic profile of the respondent, their attitudes to their visit to the particular visitor centre and whether they had made any purchases. A total of 311 responses were collected. Preliminary results show a link between tourism liking and wine purchases. This finding has managerial significance as it confirms that wineries should focus on certain service elements in order to sell more wine at the visitor centre.

Introduction

O'Neill and colleagues (2003) studied the relationship between service quality at the cellar door and future behavioural intent. Their results showed that service process factors were more closely linked to wine purchase than tangible elements (O'Neill et al.

2002). More specifically, the authors showed behavioural intent to be more related to service quality elements such as contact and responsiveness rather than to the more tangible elements of the wineries products. In this paper, we are concerned with highlighting the similarities and differences between tourists (customers) who purchase wine at the winery visitor centre and those that don't. We imply here that it is very important for a winery to actually sell wine at the visitor centre when potential customers have made the effort to get there. The majority of research and discussion to date has been on the impact the visitor centre may have on future wine sales through other channels, the impact of visits on brand equity and on the general strategic impact of wine tourism (Morris and King 1997; Beverland et al. 1998; O'Neill et al. 2002).

Results

Our study indicated that the highest proportion of wine tourists were in the 25-34 age group, comprising 37% of all visitors to the winery visitor centre. The South Australian Tourism Commission report (SATC) showed a percentage of 30% for this same age group (anon. 2001). One reason for the high percentage of 25-34 year olds in our study may be the time of the year (January). Table one shows the breakdown of visitors by age.

Table one: Visitor breakdown by age.

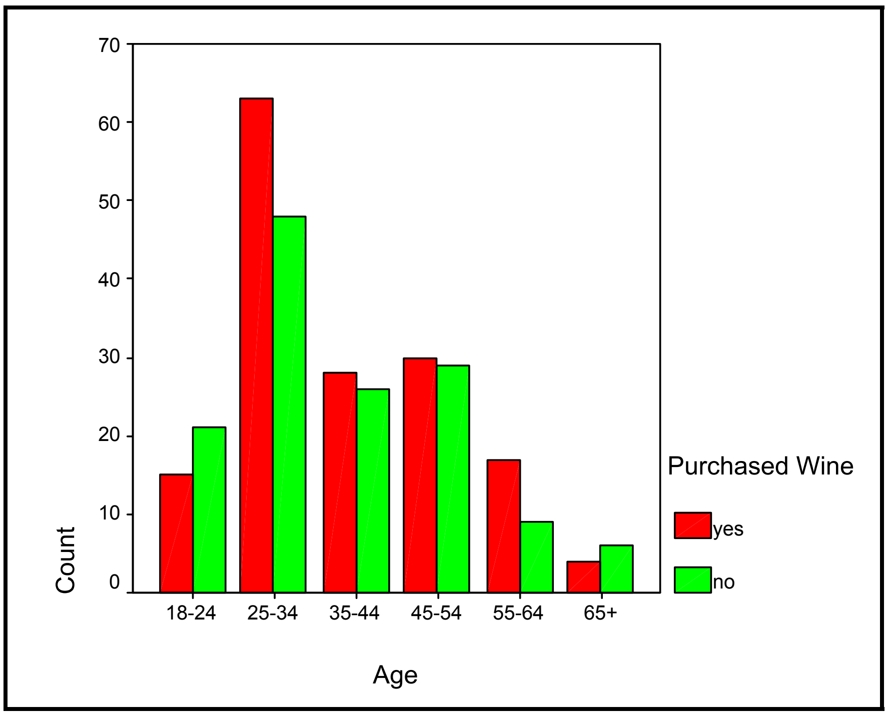
Age	Frequency	Percent (%)	Cumulative Percent (%)
18-24	36	12	12
25-34	111	37	49
35-44	54	18	67
45-54	59	20	87
55-64	26	9	96
65+	10	4	100
Total	297	100.0	

From further studies and from this study, we have identified that around 1/3 of visitors are aged 25-34. We now analyse these age groups in terms of who actually purchased wine.

Proportion who bought, within each age group

Our findings show that only 53% of visitors purchased wine. Both the 25-34 and the 55-64 year categories showed a higher proportion that actually bought wine. This is shown in figure one. We will analyse these two age groups later to determine if they are different to other consumers or just purchase more.

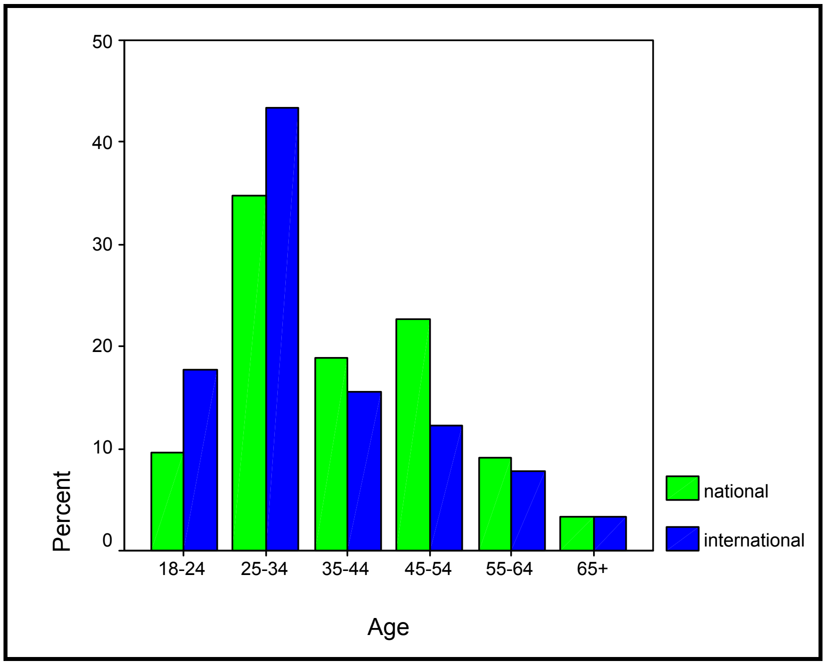
Figure one: Proportion by age group that bought wine



International/National

In terms of international visitors, our sample shows that this group representing 30% of all visitors. This seems quite high compared to most research reports, which indicate that around 10% are international visitors. This high figure (30%) may once again, be due to the time of the year. There may also be some bias in that a majority of the visitor centers used for the study had an international reputation. When we look at the differences amongst international and national visitors, in terms of age, our sample shows a high skew towards 25-34 year olds.

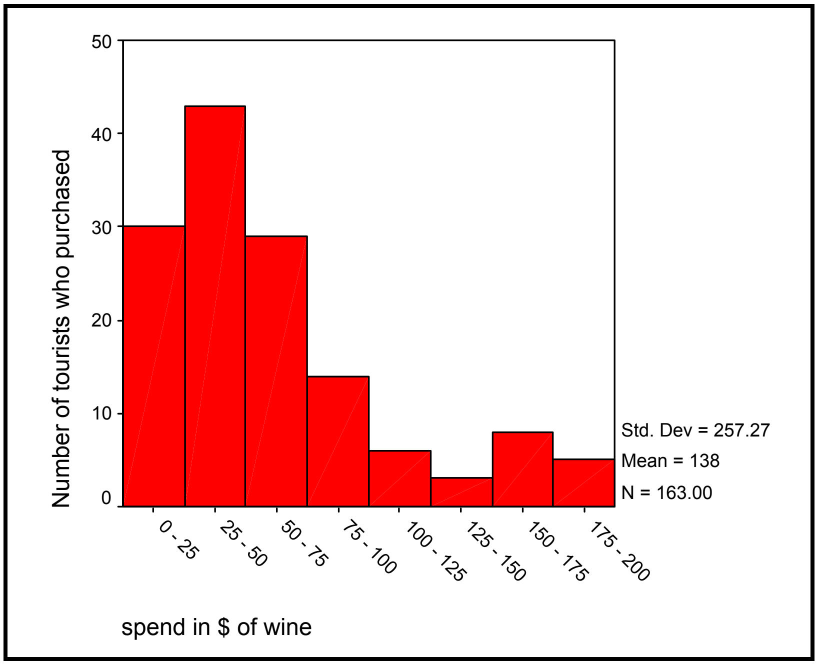
Figure two: Proportion in each age group for national and international tourists



How much do they spend?

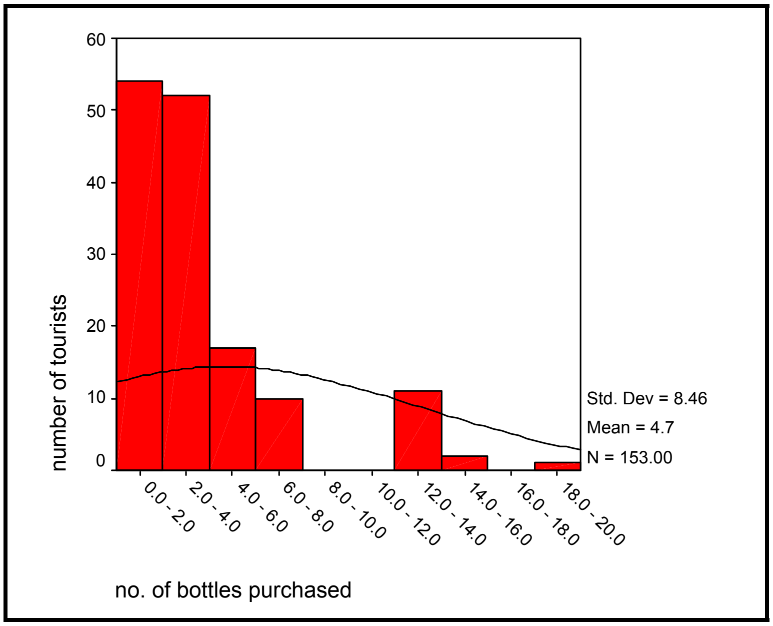
As mentioned, 53% of consumers purchased wine. The average spend was $138 and the average number of bottles purchased was 4.7. This figure is influenced greatly by the few consumers who spent unusually high amounts. Looking at figure three, around half of the total visitors that purchased wine, spent $50 or less.

Figure three: Dollar spend of wine



In terms of the number of actual bottles of wine purchased, over two-thirds of the respondents purchased four bottles or less (figure four shows this). In analysing each winery visitor centre individually, there does not seem to be a relationship between a well-known wine brand and the number of wine dollars spent or bottles purchased. In other words, the reputation of the brand does not seem to influence the amount spent or the number of bottles purchased.

Figure four: Number of bottles of wine purchased



International Purchases

The major difference between international and national visitors is in the proportion that actually purchased. While 59% of national visitors purchased wine, only 39% of international visitors did so (see table two). This would suggest that international visitors were more inclined to be visiting for the winery experience than to purchase wine. The average spend for international visitors on wine was $77 (compared to $138 for the total sample) and the average number of bottles bought was 3.2. 38% of the international visitors, who bought, bought only one bottle and 34% of those that bought, purchased two bottles.

Table two: Age breakdown by Winery Visitor Centre.

	Bought Wine - Yes or No		**Total**
	Yes	**No**	
National	123	84	207
	59%	41%	100%
International	35	55	90
	39%	61%	100%

Total	158	139	297
	53%	47%	100%

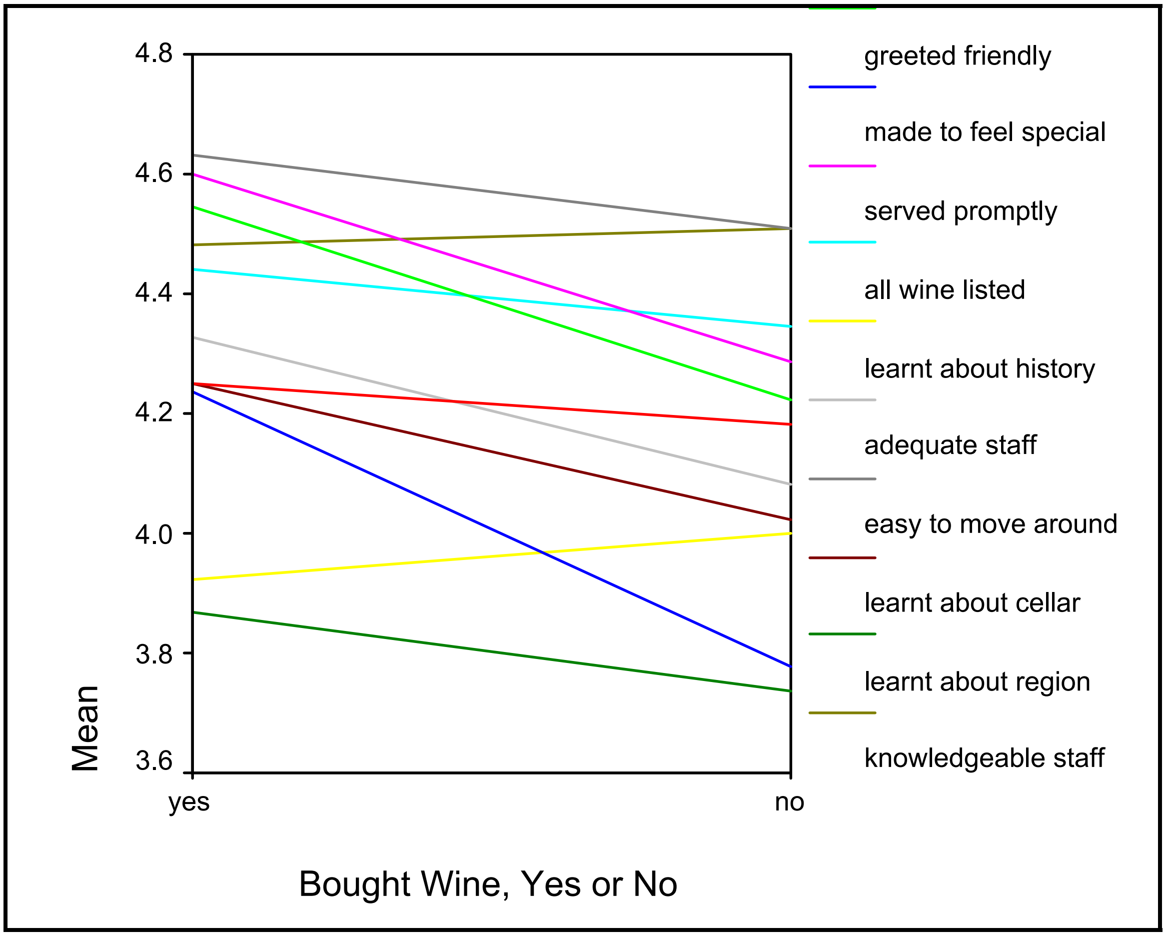
Does attitude to the visitor centre influence the purchase of wine?

Visitors were asked to evaluate the performance of the particular winery visitor centre. A five-point Likert scale was used for this purpose, with 1 being 'strongly disagree' and 5 being 'strongly agree'. Generally, consumers rated all the winery visitor centres highly, with the average being around four out of a possible five. However, while there was no significant relationship between particular criteria and actual purchase, table three and figure five show that consumers who purchased wine, tended to rate the winery visitor centre higher than those that didn't purchase wine. The shaded areas indicate those criteria where there were the greatest differences between those that purchased wine and those that did not. This would suggest that if the visitor likes the winery visitor centre, they are more likely to purchase. Figure five illustrates the trend in the differences between the two groups.

Table three: A comparison of the performance of the winery visitor centre - between those that bought and those that did not.

Criteria	Bought Wine - Yes or No		Difference
	Yes	No	
	Mean	Mean	
Entrance welcoming	4.26	4.18	.08
Greeted in a friendly and personal manner	4.54	4.22	.32
Made to feel special during my visit	4.21	3.82	.39
Served promptly at the tasting table	4.60	4.27	.33
All wine listed for tasting were available	4.45	4.37	.08
Learnt something about the history of this winery	3.92	4.00	-.08
There was adequate staff to cater for the visitors	4.32	4.09	.23
Easy to move around the cellar door	4.62	4.52	.10
Learnt something about this cellar door's type of wines	4.21	4.06	.15
Learnt something about this wine region	3.82	3.78	.04
Tasting staff were knowledgeable	4.45	4.50	-.05

Figure five: Performance evaluation of the winery visitor centre



Referring to table three and figure five, preliminary it would seem that the characteristics of a visitor that purchased is one that tends to rate the visitor centre highly as well as a preference to be 'greeted in a friendly manner', 'made to feel special' and 'served promptly'. The findings would also suggest that there is an opportunity for winery visitor centres to sell more wine by focussing on these areas. International visitors and national visitors showed no difference in these ratings.

Importance Levels

It is always difficult to capture the importance of certain winery visitor centre features. Visitors always tend to state 'to taste wine' as the most important feature they are looking for, with it always difficult to capture the importance of merchandise, for example. O'Neill et. al. (2002) utilised SERVQUAL with dimensions of responsiveness, assurance, tangibles, empathy and reliability to measure service elements. In this study, we have explored the use of more wine and tourism specific elements. Visitors were asked to rate how important each of the features were to their visit to any visitor centre. The results are shown in table four. As can be seen, “friendly staff’, “prompt service” and “number of wines at different price points available for tasting”, gained the highest rating among both those that bought and those that didn’t. The largest difference between the two groups was in the importance of “buying wine”, where the tourists that bought wine rating it as a 4.01 and those that did not, a 3.29.

Table four: Importance criteria for a winery visitor centre.

Features	Bought Wine – Yes or No		Difference
	Yes	No	
	Mean	Mean	
Very friendly staff	4.41	4.27	.14
Prompt service	4.29	4.10	.19
No. of wines at different price points available for tasting	4.26	4.00	.26
Learn specifically about this winery and its wines	3.62	3.57	.05
To learn about this wine region	3.45	3.43	.02
Staff with a high technical knowledge of wine and food	3.83	3.82	.01
Tour of the winery	2.66	2.83	-.17
Food and wine matching experience	2.80	2.95	-.15
Lunch and/or meals	2.36	2.36	0
General wine education	3.28	3.09	.19
To buy wine	4.01	3.29	.72
Special wine discounts for cellar door wine purchases	3.89	3.65	.24
History of winery	3.25	3.17	.08
Meeting a member of the wine making team	2.61	2.54	.07
Clothing and other merchandise available for purchase	1.89	1.76	.13

Special treatment as a wine club member	2.17	1.84	.33
Local food and craft produce at this cellar door	2.24	2.20	.04
A place to sit and rest	2.74	2.88	-.14
Galleries, arts and crafts	2.10	2.24	-.14
Children's activities	1.75	1.92	-.17

Factor Analysis of Importance Levels

Assessing the means of a number of variables (such as in table four) can give good insight into importance elements of wine visitors, but more advanced analysis, such as factor analysis, can determine what variables best explain other variables. This is where the importance of merchandise, for example, can be better explained. Table five shows a factor analysis of the total wine tourist sample. The features highlighted best explain what the tourists are after. “Prompt Service” best explains the other two features in component 3, so it would seem that tourists that want to focus on wine can be catered for best through prompt service. Winery visitor centres also have to cater for tourists that want to learn about the winery. “Learn specifically about this winery and its wines” best explains component 2. Some tourists require a further tourism experience - “Local food and craft product” best explains the need to offer this tourism experience within component 1. These same scores do not change between age and between nationality, which suggests that consumers are not different and that there does not seem to be segments in the wine tourism market.

Table five: Importance criteria for a winery visitor centre.

Feature	**Component**		
	1	**2**	**3**
Very friendly staff			.633
Prompt service			***.763***
No. of wines at different price points available for tasting			.614
Learn specifically about this winery and its wines		***.807***	
To learn about this wine region		.720	

Staff with a high technical knowledge of wine and food		.635	
Tour of the winery		.674	
Food and wine matching experience	.420	.579	
Lunch and/or meals	.623		
General wine education		.575	
To buy wine			.617
Special wine discounts for cellar door wine purchases			.654
History of winery		.602	
Meeting a member of the wine making team	.407	.515	
Clothing and other merchandise available for purchase	.666		
Special treatment as a wine club member	.601		
Local food and craft produce at this cellar door	***.812***		
A place to sit and rest	.694		
Galleries, arts and crafts	.798		
Children's activities	.663		

Level of Involvement with Wine

As well as questions specifically related to their visit to a winery visitor centre, visitors were also asked to rate their level of involvement with wine. Three questions were asked, using a five point Likert scale, to see if more highly involved tourists purchased a higher proportion of wine and spent more. The results showed that “very highly involved” visitors were not that different to less involved tourists. They did not purchase more wine. Of particular interest and for future reference, was the fact that there were twice as many females as males in the lower age brackets (18-24 and 25-34) that were highly involved with wine. Furthermore, 31% of all highly involved visitors comprised of females from these two age groups. While the research showed that there was no link with wine purchases, this would seem to be an issue to keep in mind in the future.

Conclusion

This paper contributes by analysing those visitors that purchased wine versus those that did not. It specifically identifies respondents who purchased immediately at the winery visitor centre and as such, adds insight into those tourism elements that may influence purchase immediately. The results are further summarised below;

- 53% of tourists bought wine.
- Visitors who liked the winery visitor centre and rated it highly, tended to buy wine.
- Ratings for “friendliness”, “made to feel special” and the “prompt service” features showed the greatest difference between those that bought and those that didn’t buy wine.
- Visitors from the different age groups were similar in their importance evaluation for the features of a winery visitor centre. They also purchased very similar amounts.
- National and International visitors were similar in their importance evaluation for the features of a winery visitor centre. The real difference was in the amount purchased. International visitors purchased fewer bottles for reasons of physical convenience, rather than purchasing less because of the actual performance of the visitor centre.
- Visitors want “prompt service”, “local food and craft produce” and to “learn specifically about this winery and its wines”. “Local food and craft produce” therefore provides an excellent opportunity to gain revenue from international visitors.
- It would seem that there is potential to increase wine sales at the winery visitor centre, particularly to the national visitor (only 59% purchased wine).
- The level of involvement visitors have with wine does not increase their probability of purchase, the number of bottles purchased, or the amount of wine dollars spent. Young females comprised 31% of all highly involved wine visitors.

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