PRIMARY AND SECONDARY WINE TOURISM –
A SEGMENTATION APPROACH

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In the last 25 years, wine tourism has played an increasingly important role in scientific research. Due to the noticeable success of wine tourism around the world, many countries have increased their focus on this lucrative market. In Europe, scientists and governments have noticed the economic significance of this sector. Some authors have contributed profoundly to the understanding of wine tourism in Germany. However, there is still a lack of research into who the tourists in German wine regions really are. This work can be seen as a classical segmentation study with a slightly different approach to previous research.

There has been a consensus about the existence of different tourist segments in wine-growing regions since the beginning of academic research in this field. The segment referred to as "wine tourist", on the other hand, seems to be problematic. Visiting a cellar door is presumably the most important wine tourism experience. Since most of the previous research has been done on winery visitors, the "real" wine tourists were the only focus, but there have been almost no comparisons made between the wine tourists and the rest. Furthermore, surveys were usually only conducted in one region. Thus, the gap to be filled was defined as follows: First, interviews should be conducted in more than one region. Second, different geographical interview locations should be chosen, at best at wine-neutral locations. Third, in addition to the aspect of visiting wineries, a segment of people who participate in wine tourism as a secondary element should be introduced.

The survey was conducted face-to-face within the period from May 1, 2017 to June 10, 2017. Targets for the survey were tourists in six of the 13 German wine regions. Since the overall approach was to not just interview "real" wine tourists at cellar doors, wine festivals or such, 8 to 10 wine-neutral interview locations (i.e. city centers, cultural sights etc.) were selected in cooperation with the regional wine associations. The method at hand was a Face-to-Face survey. Travelers were asked about their motivation, activities and expenses during their stay, as well as their socio-demographic characteristics.

To find out the share of *Primary Wine Tourists*, in other words "real" wine tourists, a two-step segmentation approach was developed. First, the respondents were clustered into two groups by whether or not they had visited or were still expecting to visit one or more wineries during their current trip. After this step, there were the two segments of *Winery Visitors* and N*on-Winery Visitors*.

Since visiting a winery is perhaps the most important wine tourism experience, it attracts mainly highly involved wine lovers. These can be classified as wine tourists. However, literature also tells us that there is a possibility of so-called *Hangers on*, i.e. people that don't have a big interest in wine but came to the winery as part of the group. Because of that, winery visitors were also asked about the relevance of wine/winemaking in their travel motivation on a Likert scale from 1 to 5, 1 meaning 'irrelevant' and 5 meaning 'very important'. If winery visitors checked 4 or 5 in this question, thereby stating that wine/winemaking played at least an important role during the trip for them personally, they belonged to the segment of *Primary Wine Tourists*. The rest of the winery visitors who did not consider wine/winemaking an important factor in their trip consequently were classified as *Secondary Wine Tourists*. In the end, there were three tourist segments that played a role in this work: 1. *Primary Wine Tourists*, 2. *Secondary Wine Tourists*, 3. *Non-Winery Visitors*.

In total, 1,735 questionnaires were collected. 32% of the respondents could be classified as *Primary Wine Tourists*, another 19% as *Secondary Wine Tourists* and the other 49% as *Non-Winery Visitors*. Although a simple approach was followed, the results proved to be congruent with literature. 'Real' wine tourists (*Primary Wine Tourists*) were found to be older, better educated and had higher incomes than the other segments. Also, the studies confirm each other in terms of winery visitors having a higher educational degree and income, as well as wine consumption and involvement. *Primary Wine Tourists* had significantly higher expenses during their travels than other tourists. All respondents chose to visit a wine region for hedonic reasons (landscape, wine, relaxation, food), with nature being the most important motivator. Consistent with different authors, the segment with the highest wine involvement showed a tendency of enjoying wine and food pairings. For choosing which winery to visit, word of mouth is the most important factor. Due to the similarity of the results to previous studies, the conclusion can be drawn that the introduced segmentation approach, as simple as it is, is reasonable. Although the results cannot be generalized, the approach itself can be applied in any wine region of the world.