

Segmenting the Greek Wine Tourism Market using a Motivational Approach

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Introduction

Wine tourism is emerging as a growing area of special interest tourism that is based on the desire to visit wine producing regions or in which travellers are induced to visit wine producing regions, and wineries in particular, while travelling for other reasons (Brown & Getz, 2005). According to Getz & Brown (2006), this particular tourism activity is, "...simultaneously a form of consumer behaviour, a strategy by which destinations develop and market wine-related attractions and imagery, and a marketing opportunity for wineries to educate and to sell their products directly to consumers". When viewed from consumers' perspective, wine tourism is defined 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 motivating factors for visitors" (Hall et al., 2000:3).

The above definitions pose a number of questions regarding visitors: Do these visitors comprise a distinct market group with specific characteristics compared to an average traveler in rural areas or urban destinations?

Does wine tasting constitute the main reason for visiting a grape wine region? Which particular attributes of the grape wine re-

gion are the primary motivating factors for visitors? Does wine tourism apply to only one specific type of consumers? A wine lover may visit a winery with his friends, or family, who do not share the same interest in wine. And what is the relation amongst these reasons and wine consumption?

In fact, someone who engages in wine-related tourism, is rarely interested simply in wine tasting (Roberts & Sparks, 2006), but seeks for a total tourism experience, which offers a regional 'bundle of benefits' (Charters and Ali-Knight 2002; Getz et al. 2008). Such complementary benefits include the rural landscape and the appealing environment, romance and relaxation, exploration, socialising, communing with other people, hospitality, meeting the winemaker, festivals, or learning about wine. Authenticity, regional culture and gastronomy are also closely linked to wine tourism (Alant & Bruwer, 2004; Carmichael, 2005; Charters & Ali-Knight, 2000; Mitchell et al., 2000:130). Hall and Mitchell (2002) discuss the concept of 'touristic terroir'

in order to describe "the unique combination of the physical, cultural and natural environment (that) gives each region its distinctive tourist appeal".

Although identifying the wine tourist has been an important dimension in previous studies, information about wine tourism

Abstract

When wine tourism is approached as a form of consumer behavior, a part of research focuses on the demand side, exploring the consumers who travel to wine regions. Key researchers have commented that there is no stereotypical 'wine tourist'; however, some distinctive features regarding profiling and segmentation can be drawn from literature. The objective of this paper is to address these issues as well as to provide an insight into the winery visitor in Greece.

A quantitative approach was employed and 133 visitors to 13 wineries of the 'Wine Roads of Northern Greece' were surveyed through the use of a structured questionnaire. Accordingly, in order to identify their profile, descriptive analysis was carried out and specific demographic, socio-economic, and other behaviour characteristics were assessed. Analysis suggests that the winery visitor in Northern Greece is predominately a young male, well educated, with a high income and comes from urban centres in close proximity to the wine region.

Furthermore, Two-step Cluster Analysis was performed on the basis of the wine tourists' motivations for visiting the wine region. Four exclusive groups were generated: (i) the 'Wine lovers'; (ii) the 'Neophytes'; (iii) the 'Occasional visitors' and (iv) the 'Hangers-on'.

Keywords: Wine Tourism, Winery Visitors, Market Segmentation, Two-step Cluster Analysis.

Résumé

Lorsque l'oenotourisme est abordé comme une forme de comportement des consommateurs, une partie de la recherche se concentre sur la demande, en explorant les consommateurs qui voyagent vers les régions viticoles. Les principaux chercheurs ont commenté qu'il n'y a aucun "oenotouriste" stéréotypé, mais certains traits distinctifs en matière de profil type et de segmentation peuvent être tirés de la littérature. L'objectif de ce document est de répondre à ces questions ainsi que de donner un aperçu sur les visiteurs des caves en Grèce. Une approche quantitative a été adoptée pour 133 visiteurs de 13 caves qui appartiennent aux «Routes des vins de la Grèce du nord». Les visiteurs ont été interrogés par le biais d'un questionnaire structuré. L'analyse descriptive a été réalisée afin d'identifier leur profil et d'autres caractéristiques du comportement. L'analyse indique que le visiteur des caves dans le nord de la Grèce est essentiellement un homme jeune, bien éduqué, avec un revenu élevé et provient des centres urbains à proximité de la région viticole. En outre, La Classification Automatique Hiérarchique a été appliquée aux données qui concernent les motivations des touristes pour visiter la région viticole. Quatre groupes exclusifs ont été générés: (i) les «Amoureux du vin» (ii) les «Néophytes», (iii) les «Visiteurs Occasionnels» et (iv) les «Indifférents».

Mots-clés: Oenotourisme, Visiteurs des caves, Segmentation du marché, Classification Automatique Hiérarchique.

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consumer behaviour is rather limited (Alonso et al., 2007). As visitors' expectations seem to vary from region to region (Charters & Ali-Knight, 2000), "*there is no single, stereotypical wine tourist, nor there is a unilateral definition of him or her*" (Charters & Ali-Knight, 2002). Furthermore, the multiple demographic profiles that exist worldwide hinder the creation of a definitive model of wine tourists and stress the need of a cluster of independent variables that can together be used for classification (Thompson & Prideaux, 2009). Thus, more research is needed to gain a deeper understanding of wine consumers in general (Getz et al, 2008).

Such considerations have led both academics and wine tourism stakeholders to further research, in order to better understand the nature of the wine tourist, as well as wine-related consumer behavior in general. To this end, market segmentation is of central importance for wine tourism operators in terms of product development and marketing purposes (Mitchell et al., 2000; Williams & Kelly, 2001) as it helps them to 'know their customers' (Fry, 1999, in Houghton, 2008) and to be competitive. In some cases, market segmentation is based on socio-demographic variables. However, visitors with similar demographics may present considerable differences concerning their attitudes, lifestyle and wine consumption behaviour (Bruwer et al, 2002). Therefore, several psychographic variables, such as motivations, lifestyle, interests, values, personality, etc can also be used as criteria for segmentation and provide a better insight into 'who' exactly the wine tourist is (Galloway et al., 2008).

This paper adds to the limited data of the newly established wine tourism market in Greece, by exploring the particular characteristics of winery visitors. Additionally, it proposes a typology of winery visitors, on the basis of their motivations along with wine lifestyle components.

1. Who Is The Wine Tourist? A Global Overview

Descriptions of wine tourists before 1995 vary and in some cases are not flattering. Spawton (1986: 57, in Macionis & Cambourne, 1998: 42) describes them as "*mobile drunks*"; McKinnna (1987: 85, in Macionis & Cambourne, 1998: 42) refers to wine tourist as "*the passing tourist trade who thinks a 'winery crawl' is just a good holiday*", with a milder description being "*wine connoisseur*" (Edwards, 1989 in Macionis & Cambourne, 1998:42). Only after 1995 academics began to focus on the wine tourist, while it is important to stress that most often information has been gathered from the wineries' perspective (supply – side research) rather than from the wine tourism consumers themselves (Mitchell et al, 2000; Tassiopoulos et al, 2004). Another drawback in research was the fact that a substantial amount of the latter deals with winery visitors and their relationship with special issues concerning specific tourism products or services and does not investigate wine tourists in general (Williams & Kelly, 2001).

Dodd (1995) asserts that a winery visitor is generally of higher educational level and income comparing to an average traveler. Other researchers suggest that this special form of tourism attracts a more "*ethical traveller, who interacts well with locals*

and spends large sum of money" (O'Neill & Charters, 2000) and who is more "*active and engaged than other tourists*" (Williams & Kelly, 2001). Mitchell et al. (2000), based on studies in Australia, New Zealand and the U.S.A., arrive at the following description: "*... usually 30-50 years of age, in the moderate to high income bracket and comes from within or in close proximity to the wine region itself*". More recently, Treloar et al. (2004), pinpoint several similarities in previous studies regarding the winery visitor, which they describe as "*predominantly female, generally university or higher educated and with a slightly higher than average income...usually domestic or intrastate traveller who has some experience with wine or wine education*".

Despite the fact that wine-making activity has a long tradition in Europe and over 60% of all world wine is produced there, research concerning the consumer of wine tourism is relatively inchoate (Charters & Carlsen, 2006). Lopez-Guzman et al. (2008) found that a typical wine tourist in Southern Spain is between 50-59 years old, middle/high income and usually travels with family. According to Gatti & Maroni (2004), the wine tourist in Italy is mainly young, foreign male. As far as Greece is concerned, wine tourism is still a relatively new tourism sector and thus there is a lack of official data. At the moment there are six wine tourism networks in Greece; however, the first and best organised is the one in Northern Greece. It was set up in 1993 as a non-profit, non-stock corporation by the joint efforts of the 15 members of the Macedonian vineyard. In 2002, wineries in Epirus and Thrace joined the association, which was renamed the 'Wine Producers Association of the Northern Greece Vineyard' with the trade name 'Wine Roads of Northern Greece'. In 2008, the network grew to include selected hotels, restaurants, local produce and outdoor activities businesses. Along with a host of local cultural activities, it offers visitors to the Northern Greek vineyard a total of eight different routes (Karafolas, 2007).

2. Wine Tourist's Psychographics: Motivations and Wine Lifestyle

Wine tourists' motivations

Alant & Bruwer (2004) discuss the importance of motivations in wine tourism research, commenting: "*...the wine tourist arguably lives with needs both as a tourist/leisure/recreation seeker and as a wine consumer*", while Bruwer & Alant (2009) describe the wine tourist as "*a person with needs to relate to both wine and the location where wine is produced*". Johnson (1998) suggests that information concerning the internal motivation of this kind of travellers can help to segment markets into useful niches. However, only recently motivations and other psychographic characteristics of wine tourists have been investigated (Galloway et al., 2008).

According to Dann, 1977, there are two motivational stages in a travel decision: push and pull factors. Push factors are internal motivations that drive an individual to visit the winery (socialising, learning about wine, relaxation, meeting the winemaker). Pull factors (or external motivations) draw the visitor to the winery and include in general characteristics or activities of the win-

ery (wine tasting and buying, tours, eating at the winery and rural setting) (Mitchell et al., 2000; Yuan et al., 2005).

Researchers (Alant & Bruwer, 2004; Charters & Ali-Knight, 2002; Hall et al., 2000) have identified the primary motivations of wine tourists being 'wine tasting and purchasing', and secondary or peripheral motivations such as 'socializing', 'learning about wine', 'entertainment', 'rural setting', 'relaxation', etc (Bruwer & Alant, 2009; Carmichael, 2005; Hall et al, 2000). Getz and Brown (2006) point out that the experience of wine tourism includes three core dimensions, which they label the 'core wine product', 'core destination appeal', and 'the cultural product'. These findings are supported by Sparks (2007), who proposes the following three dimensions: 'destination experience', 'core wine experience' and 'personal development'. While 'destination experience' and 'core wine experience' are pull factors, 'personal development' is considered to be an internal motivation (push factor) and is strongly related to the desire to seek information about wine. Alant & Bruwer (2004) developed a conceptual motivational framework for wine tourism, including three dimensions, namely: the visitor, the wine region and the visit dynamic.

A first basic distinction between wine tourists based on motivations was introduced by Johnson (1998:15, in Galloway et al., 2008). Using as a main criterion the purpose of the visit, he distinguishes two types of wine tourists: The 'Specialist winery tourist', who "*visits a vineyard, winery, wine festival or wine show for the purpose of recreation and whose primary motivation is a specific interest in grape wine or grape wine-related phenomena*" and the 'Generalist' visitor, who "*is primarily motivated to visit a wine region for other reasons*". Similarly, Williams and Dossa (2003) segmented the non-resident wine tourism market in British Columbia into two distinct groups: the 'Generalists' and the 'Immersionists'. The second type of visitors gives a greater emphasis on increasing knowledge about the wine region and participates in various cultural activities. Jago et al. (2000) identified the 'Serious Wine Tourist' on the basis of the planning of the visit, size of winery, motivations for visit and length of stay in the wine region. Wine tourists' motivations were also the basis for the segmentation applied by Gatti & Maroni (2004), who classified wine tourists into four distinct groups: 'the Professional', 'the Cultured', 'the Enthusiastic' and 'the Wine Tourist by Change'.

Wine Lifestyle

Apart from travel motivations, lifestyle components, such as wine knowledge and behavior were used as a basis for segmenting the wine tourists in Italy. Four groups of wine tourists emerged: 'The Professional', 'the Impassioned Neophyte', the 'Hanger-on' and 'the Drinker' (Coriglano, 1996). Following the same approach, Macionis & Cambourne (1998:44) used data from a previous research in Australia (Roy Morgan Holiday Tracking Research, 1996) in order to create a 'wine tourism portfolio'. The latter classifies wine tourists in ten 'value segments', using as criteria socio-economic variables as well as values, beliefs and the general lifestyle.

Knowing the wine tourists' level of interest in wine is of high importance (Mitchell et al., 2000: 124). Based upon this criterion, Ali-Knight & Charters (1999) segmented wine tourists in two categories: the 'Casual Tourists', who just want to taste wine and nothing else and the 'Sophisticated Drinkers', who seek to gather as much information as they can about the product. This 'intuitional approach', was firstly issued by Hall (1996). The segmentation, using as a basis both tourists' motivations and their interest in wine, resulted in three primarily segments: 'The Wine Lover' (who is similar to the 'Specialist' of Johnson's typology), 'the Wine Interested' and 'the Curious Tourist'. Charters & Ali-Knight (2002) built upon Hall's typology and segmented wine tourists into five groups, namely: 'The Wine Lover', who has a desire to have a learning experience, 'the Connoisseur' (which is a sub-set of the wine lover), 'the Wine Interested' and 'the Wine Novice' (correspondingly to the curious tourist). They also added a small group that includes the "Hangers-on".

It has thus been suggested that wine is in many cases the primary motivation for winery visitation. However, there is a set of other motivating factors, which are not directly related to wine and need to be further explored (Thompson & Prideaux, 2009). Galloway et al. (2008) used therefore the personality value 'sensation seeking' as a basis to segment wine tourists in Australia, to arrive at two types: 'Highly' and 'Lower' sensation seekers.

3. Research Method

A quantitative approach was employed in order to determine the specific characteristics, motivations and wine lifestyle components of visitors to wineries of 'Wine Roads of Northern Greece'. In an attempt to meet the objectives of the research, related literature and previous wine tourism research were used and a structured questionnaire was developed. The latter was divided into four sections: the first included questions centred on the trip characteristics and visitors' perceptions regarding the wine region, while, the second part dealt with wine lifestyle. The third section concentrated on topics related to visitors' attitudes and motivations for visiting the specific winery and finally, the fourth section was used to obtain socio-demographic information of the respondents.

Research was based on a random sampling of 133 adult visitors from 13 wineries, all members of the 'Wine Roads of Northern Greece'. It is important to mention that, at the time of the survey, the Association of the Winemakers of Northern Greece included 23 wineries. Data collection was conducted during the weekends over a five-month period (January - May 2006). The specific period was chosen because, as Alonso et al. (2007) suggest, these months appear to be popular among winery visitors. Weekends were selected as the best time for collecting data because Saturday and Sunday are the busiest days for most wineries (Dodd & Kolyesnikova, 2005). Additionally, in the case of Northern Greece, as wine tourism is a relatively recent phenomenon, it was considered that the 'Open Doors' event takes place in May and usually attracts high visitation. Four trained field workers approached randomly the visitors and

conducted personal interviews with them, when completing their visit to the selected wineries.

After the survey, data were analysed using SPSS Version 12. At first, descriptive analysis was conducted in order to sketch the socio-demographic and psychographic profile of the respondents. Correlations between variables were evaluated by Pearson's and Spearman's coefficients and differences were detected using the Mann-Whitney test. Further analysis involved two-step cluster analysis in order to identify segments of winery visitors who differ regarding several socio-economic and psychographic aspects. Seventeen variables were selected for the typology, two of which refer to the visitors' wine lifestyle (interest in wine and wine consumption) and the rest to their motivations for visiting the wine region. Finally, correlations between clusters and specific visitors' demographic characteristics were checked, using Pearson's χ^2 .

4. Findings

Socio-demographic Profile

Table 1 provides an overview of socio-demographic characteristics of the sample. The respondents' gender was split nearly equally, with only a slight preponderance of males (51.1%). These results do not seem to be consistent with other studies, which report that the wine tourists are predominantly females.

More than half of the visitors (51.1%) were younger than 35 years old, with a third (33.8%) aged 26-35 years, while only 11, 3 % of them were in the 56-65 age group. These findings lend support to the view that there is an international trend of younger consumers developing more interest in wine (Dodd & Kolyesnikova, 2005). Regarding their marital status, almost half of the winery visitors are married or cohabitants (49.6%), 47.4% of them are unwed while the rest 3% of the sample answered 'other'.

In terms of educational and income levels, results appear to be similar with findings of previous studies (Charters & Ali – Knight, 2002; Tassiopoulos & Haydam, 2006; Yuan et al., 2005), confirming that the wine tourist is well educated, since 76.7% of the respondents held at least a college or a university degree. Occupation was diverse, with employees (27.1%) and free lancers (26.3%) being the most common ones. Students represented 13.5% of the sample. Given their educational level and occupation, it is not surprising that over one third (35.5%) of the respondents has high monthly income (more than 1750 Euros)¹. This result is also consistent with the findings of previous studies, suggesting that the wine tourist belongs to the high-income bracket.

In terms of place of origin, wine tourism in Northern Greece seems to apply exclusively to domestic visitors. More specifically, the major source of wine tourists was Thessaloniki (72.2%), while 21.8% of them came from other urban centres of

the Macedonia region. Athenians contributed another 3%. Further, there is a statistically significant difference between specific winery visitors and their place of residence (Pearson's χ^2 Continuity Correction = 0.009), thus verifying the premise that wine tourism is local or regional in origin (Getz, 2000)².

Travel-related characteristics

Hu & Morrison (2002, in: Tassiopoulos & Haydam, 2006) use the term 'tripographics' in order to define travel-related behavioural characteristics, such as the duration of stay, transport facilities used, type of accommodation, etc. This part presents the results of the survey in terms of these variables.

Almost half of those surveyed (42.1%) reported visiting the wine region for the first time. Regarding the length of stay in the region, results are in line with Alant & Bruwer, (2004), who assert that wine tourism is mainly a short-term type activity. The majority of visitors (77.4%) were day trippers, while overnight (6.8%) and two day trips (7.5%) or more (8.3%) were not so common. These results, confirm some aspects of previous research, according to which visitors who travel shorter distances are usually day-trippers (Dodd & Kolyesnikova, 2005). Overnight stays were mainly in guest houses (36.66%) or in hotels (20%), while a part of the respondents (23.33%) stayed with friends and relatives and another 20% owned their own houses in the region. The survey also found that 70.7% of the respondents used their own vehicle for transportation in the wine region, 28.6% came by tour bus, while another 0.8% reported having used other transport facilities.

Table 1 – *Socio-economic profile of winery visitors in Northern Greece (N = 133).*

Gender		Age					
Male (%)	Female (%)	18-25 (%)	26-35 (%)	36-45 (%)	46-55 (%)	56-65 (%)	
51.1	49.9	17.3	33.8	21.1	16.5	11.3	
Occupation							
Free Lancer (%)	Employee (%)	Civil Servant (%)	Farming (%)	Home duties (%)	Retired or on pension (%)	Student (%)	Missing (%)
26.3	27.1	17.3	1.5	6	5.3	13.5	2.3
Education							
No college degree (%)	College degree (%)	Postgraduate degree (%)					
23.3	63.2	13.5					
Monthly Income (in Euros)							
Under 750 (%)	751 – 1000 (%)	1001 – 1500 (%)	1501 – 2000 (%)	Over 2001 (%)	Missing (%)		
12.8	12.0	25.6	28.5	19.5	1.5		
Area of Residence							
Thessaloniki (%)	Athens (%)	West Macedonia (%)	East Macedonia (%)	Central Macedonia (%)	Other (%)		
72.2	3.0	10.5	3.0	8.3	3.0		

¹ According to the Labour Institute of the General Confederation of Greek Workers (INE/GSEE, 2007), the average monthly gross income per employee in Greece was 1501 Euros in 2006.

² See also: Dodd, 1995, Yuan et al., 2005 and Jaffe & Pasternak, 2004.

When the winery visitors were asked to specify who they were travelling with, they reported visiting the wine region with friends (29.3%), family and/or relatives (21.1%), their partner (4.5%), as a part of an organised tour (39.1) or alone (6%). These results demonstrate the social context of wine tourism, confirming previous studies showing that visitors to wine regions tend to be almost always accompanied by others (Carmichael, 2005; Hall et al., 2000). Notably, a small percentage visited the area as part of an organised tour (13.5%). 59.4 % of the respondents reported that they had purchased wine during their visit, which support the view from previous research that the majority of winery visitors are 'genuine buyers' (O'Neill & Palmer 2004), as opposed to 'mobile drunks' (Spawton, 1986).

Apart from visiting the winery, the respondents reported participating in a number of other activities. In particular, a large majority of them (61.7%) visited the local restaurants, where they ate local dishes (84.1%) and tasted local wines (90.2%). Almost half of the visitors (49.6%) reported purchasing local products. 44.4% of the respondents reported visiting frequently wine regions, while 78.2 % of them stated that they would revisit the specific wine region.

Wine Knowledge and Level of Interest in Wine and Wine Consumption Habits

Mitchell & Hall (2003) state that the level of wine knowledge is an indicator of wine tourism. Analysis suggests that 21.8% of visitors consider themselves as highly knowledgeable, 55.6% state that they have intermediate knowledge of wine and the rest 21.8% have a limited knowledge in the area. However, according to Charters & Ali-Knight (2002), "*the problem with knowledge is that it is only suggestive of the respondent's motivation as a wine tourist and it is difficult to quantify*".

The great majority (73.7%) is highly interested or just interested in grape, wine and wine making, whereas for the rest of them the interest in wine appears limited (24.8%) or does not exist at all (1.5%). There was a significant positive correlation of interest in wine with educational status (Spearman's $r=0.036$, $cc=0.182$) as well as with monthly income (Spearman's $r=0.017$, $cc=0.208$). Educated and high income visitors indicate high interest in wine. Further analysis showed a significant positive rank correlation of knowledge about wine with monthly income (Spearman's $r=0.004$, $cc=0.252$) and a correlation tenden-

cy between knowledge about wine and age (Spearman's $r=0.052$, $cc=0.169$).

Finally, further analysis showed that the level of knowledge about wine is higher among men than among women (Mann Whitney $U=1666.500$, $a=0.007$). Respondents were also asked: "Do you consume wine in general?" Analysis suggests that almost one out of five respondents (18.8%) 'drinks a lot of wine', 58.6% of them 'consume enough', 21.1% consider themselves to drink a little and only 2.3% does not drink wine at all.

Exploring Visitors' Motives

Furthermore, in order to address motivating factors, respondents were asked to rank the top three of fourteen given factors that were associated with their decision to visit the wine region³.

'Visiting the winery' (50.4%) was rated as the most important of all the motivating factors. Reasons including 'learning about wine and wine making' (33.1%) follow in terms of importance. This finding confirms previous suggestions that the wine tourist seeks an overt educative experience during the visit (Charters & Ali-Knight, 2000) and has a strong expectation in learning about production processes (Piscitelli et al., 2005, in: Houghton, 2008). 'Purchasing wine' was the third most important reason for visiting the wine region (15%). This is supported by the fact that the majority of the respondents (59.4%), as mentioned before, purchased wine at a winery. Finally, "I heard that the tour was a good one" was ranked fourth (11.3%). Indeed, word of mouth has been identified as the most important source of information that wine tourists use before visiting a winery (Brewer & Reilly, 2006). Interesting, however, is that the 'attributes' of the grape wine region that consist the wine tourism terroir, were not primary motivations for the majority of the sample. In fact, the rural setting, sightseeing and gastronomy were not at all motives for visiting the wine region (79.7%, 89.5% and 72.9% respectively).

Furthermore, motivating factors for visiting the specific winery were measured. Respondents were asked to rank the relative importance of their reasons for visiting the winery on a five-point Lickert scale where 1 meant 'not at all important' and 5 meant 'extremely important'⁴.

The most important reason for choosing the specific winery was the desire to learn more about wine and the wine making. The participation of the winery to the 'Wine Roads of Northern Greece' Network was the second most important reason for the visit, while the proximity of the winery to the region of residence was ranked third in importance. Wine tourists give a great emphasis both on staff courteousness and hospitality offered at the winery. Notably, buying a specific brand was rated as not important in the decision to visit the winery.

Winery Visitors' Segmentation

Following the remark by Charters & Ali-Knight (2000) that the wine tourists can not be considered as a homogeneous group, Two-step cluster analysis was conducted based both on motivational and wine interest factor scores. Results led to four clusters, as the optimum solution based on the Schwarz criterion. From the total of the 133 cases, 38 were assigned to the first

³ The factors had been indicated by respondents in previous studies and were the following: 'Sightseeing', 'Rural setting', 'Relaxation', 'Visiting the winery', 'Gastronomy', 'Learning about wine and wine making', 'Tasting and purchasing wine', 'I heard that the tour was a good one', 'The wine region is in close proximity to the place where I live', 'My friends or relatives wanted to come', 'The region offers a wide range of attractions', 'Just passing through', 'Traditional architecture' and 'Previous positive experience'.

⁴ The scale was extracted from the literature and included the following elements: 'To meet the winemaker', 'To purchase a specific brand', 'The winery is close to home', 'The wine region other regions I intent to visit', 'The winery is a member of the 'Wine Roads of Northern Greece' network', 'The winery offers a variety of recreation activities' and 'The winery staff is friendly and hospitable'.

cluster (28.6% of the cases), 31 to the second (23.3%), 29 to the third (21.8) and 33 to the fourth (24.8%). Two cases were excluded (1.5%). Furthermore, the 'by variable' importance charts, produced with a separate chart for each cluster, showed the relative significance of the 17 variables used to create each one of the four clusters (Figure 1).

For cluster 1, the variables 'to visit the winery', 'to learn more about wine', 'interest in wine', 'to meet the winemaker' and 'the winery as a basic incentive for visiting the wine region' have higher than average values and thus they are the most significant ones. The variables that contributed to the formation of the second cluster were: 'to visit the winery' and 'to learn more about wine'. For cluster 3, the significant variables include 'to learn more about wine' and 'gastronomy', while for cluster 4 the variables 'to meet the winemaker', 'interest about wine', 'wine consumption' and 'the membership of the winery to the Wine Roads of Northern Greece as a motive for visiting it' are found to be significant. These four clusters were named as: (i) Wine lovers; (ii) Neophytes; (iii) Occasional Visitors; and (iv) 'Hangers-on'. Following there is a description of each cluster.

Cluster 1: The Wine Lovers

For the members of this cluster, visiting the winery is the major motivating factor for visiting the wine region. Furthermore, 49.9% of the 'wine lovers' strongly disagree or disagree with the statement: 'Visiting the winery does not consist the major motivating factor for visiting the wine region'. The second most important factor for the wine lovers' travel to the wine region appears to be their desire to learn about wine and wine making. 73.68% of the respondents of this cluster rated it as the second reason

'Meeting the winemaker' appears to be one of the main motivations for visiting the winery for the members of this first cluster. Apparently, 65.79% of them considered it as an important or extremely important factor for visiting the winery. In terms of interest in wine, the respondents of this cluster stated being interested or highly interested in wine. The members of this cluster drink a lot of wine, or stated that they consume enough wine.

At last, the majority of the visitors who comprise the first cluster are free lancers, have high income (more than 2001 Euros per month) and higher educational level.

Cluster 2: The 'Neophytes'

This cluster comprises the visitors whose main motivation for visiting the wine region is their desire to learn about wine. In particular, 9.67% of the 'Neophytes' rated this as the most important of all the motivating factors, while another 24.18% considered it as the second most important reason for the travel. Furthermore, for the 'Neophytes' the winery as an attraction is a major motive for visiting the wine region. In particular, almost half (41.93%) of the members of the second cluster rated the winery as the second most important factor for visiting the wine region, almost one out of three of them (29.03%) rated it as the third most important factor, while for 12.9% of the Neophytes, the winery is the most important factor for travelling to the wine region.

Respondents of the second cluster are mainly students, with high educational level, while their income is less than 750 Euros per month.

Cluster 3: The 'Occasional Visitors'

Respondents of the third cluster are mainly motivated to visit the wine region because of the local gastronomy. In fact, 27.58% of them rated 'gastronomy' as the second most important factor for visiting the wine region, 3.44% rated it third most important factor, while for the 17.24% of the 'Occasional Visitors' 'gastronomy' consisted the fourth most important factor for travelling to the wine region. It is important to note that almost half of them (48.27%) are not motivated to visit the wine region in order to develop their knowledge in the area of wine and wine making. Particularly, for the members of this cluster, 'learning about wine and wine making' did not consist at all a motive for the visit.

The third cluster includes visitors who in most cases do not hold a college degree, retired or in home duties and their monthly income ranges between 1751-2000 Euros.

Cluster 4: The 'Hangers-on'

Charters & Ali- Knight (2002) use the term 'Hanger-on' is used to describe a person who goes to the winery with no apparent interest in wine, but as a part of a group, which has decided to visit the attraction. Accordingly, for the (72.72%) majority of the members of the fourth cluster, the winery visit was just a part of the travel to the rural region, confirming previous suggestions that 'destination attributes' can act as attracting factors for visitors (Williams, 2001). Most of them (60.6%) were not interested in grape, wine and wine making. In fact, they were not even wine consumers, as 48.48% % of them stated that they usually drink a little wine and another 3.03% reported not drinking wine at all.

Notably, the members of this cluster (72.63%) visited the winery because of its participation to the Wine Roads of Northern Greece. On the contrary, for the 78.78% of the 'Hangers-on', meeting the winemaker was not the main reason for visiting the winery.

The members of the fourth cluster are mainly employees, with low educational level and middle income (between 751-1000 Euros).

Conclusions

Exploring the characteristics of winery visitors in Northern Greece was a valiant effort based on a quantitative approach and employed in order to identify the respondents' demographics, motivations and wine lifestyle related characteristics. The first conclusion that derives from this study is related to the winery visitors' general profile. In terms of education and income, wine related travellers in Northern Greece reflected the general socio-demographic characteristics of wine tourists, as described in previous research globally. In correspondence to the findings of several other studies, the average winery visitor is domestic, younger than 35 years old, has high levels of education and medium-high income, is ei-

ther civil servant or employee and comes from urban centers in close proximity to the wine region. Moreover, visitors to Northern Greece appear to be day-trippers, repeat visitors who use their own vehicle for transportation, travel with their friends or family and purchase wine at the cellar door. Apart from the winery visit, they have local dishes and consume local wines at the regional restaurants. They are wine consumers in general and have a high interest in wine and wine making processes.

A result that appeared to be differentiated from earlier findings concerned gender. The typical visitors of wineries in Northern Greece appear to be male who consider themselves as highly knowledgeable. Literature review indicates that males are more likely to purchase wine during their visit to wineries (Mitchell & Hall, 2004). Particularly, the older ones appear to have a better knowledge about wine, they are more interested in and more critical of the product (Getz & Brown, 2006). However, females are almost a third more likely to make a post-visit purchase (Mitchell & Hall, 2004) and seek for an 'enjoyable social experience' (Getz & Brown, 2006).

In terms of age, results indicate that winery visitors in Northern Greece are young. It is important to be stressed, that, although younger wine tourists may have limited knowledge of wine compared to older ones, they could be more important for wine tourism operators in the long term. It has also been suggested that younger respondents are more critical of their winery experience (Dodd & Bigotte, 1997) and they give more emphasis to the overall experience and the received services and less to the quality of wine (Charters & Fountain, 2006).

In terms of the motivating factors, the winery visitors in Northern Greece are motivated by both push and pull factors and could be characterized as 'Specialists' (Johnson, 1998; Williams & Dossa, 2003), as their main reasons for visiting the wine area were wine-related. It is worth noting, that factors related to the 'attributes' of the wine region did not receive support from this study's findings. On the contrary, 'Visiting the winery', 'Learning about wine' and 'Purchasing wine' were ranked as the most important motives for visiting the region. Regarding the motivating factors for visiting the specific winery, results indicate that the desire to have an educative experience, the participation of the winery to the 'Wine Roads of Northern Greece' and the proximity of the winery to the region of residence constitute the main incentives.

It has also been argued that the manner of greeting and welcoming the visitor by the winery staff results in the overall experience. Overall, factors such as the staff's friendliness, courteousness, knowledge, professional attributes and quality of service are important dimensions for visitors (Dodd, 1995; Hashimoto & Telfer, 2003; O'Neill & Palmer, 2004). Results of this study confirm this view, as respondents seem to have a strong desire to learn about wine and, furthermore, they emphasize on hospitality offered at the

winery. Therefore, the appropriate selection and training of the personnel is a very important dimension for wineries in order to satisfy their customers and achieve marketing benefits. These goals should be managed to achieve through synergies and cooperation in the overall framework of the 'Wine Roads' Network. Results also indicate that the promotional and advertising activities of the latter seem to be successful, as they attract visitors to the wineries-members.

The findings showed four types of visitors who engage wine tourism in Northern Greece: 1) the 'Wine lovers', who are usually highly educated and high income and whose prime objectives for visiting the area are: visiting the winery, meeting the winemaker and learning more about wine and wine making, 2) the 'Neophytes', who are mainly low-income students with a special interest in wine and visiting the winery is their major incentive, 3) the 'Occasional visitors', who are not interested in learning about wine, but are attracted by the local gastronomy and 4) The 'Hangers-on', whose motivations for visiting the wine region are not focused on wine, they are not wine consumers in general and they consider the vineyard or the winery as just another tourist attraction. Thus, it is of utmost importance to be stressed that the membership of a winery in the project: 'Wine Roads of Northern Greece' as well as the promotional activities of this network are important issues in terms of attracting this market segment.

The above classification has implications for the wine tourism stakeholders, as understanding the particularities of each segment is crucial in terms of product development and marketing purposes (Williams & Kelly, 2001). Thus, they can be valuable to wine tourism operators since they can constitute specific targets for wineries or wine tourism destinations. Each group of visitors can, albeit in a different level, contribute in wine tourism development. For instance, the "Occasional visitors" or the "Hangers-on" engage in wine tourism activities while travelling for other purposes. For these types of tourists, a winery visit is not the primarily motivation and probably, they visit a winery because their friends or family want to go. This confirms the view that not all wine tourists are tourists per se, but can include people engaging in leisure or recreation time (Alant & Bruwer, 2004). For wineries, these segments appear to have less commercial interest and potential. Nevertheless, they can contribute to rural tourism development in general, as they take part in a variety of activities in the wine region. In this case, a great emphasis should be given in promoting the attraction of the whole destination. Furthermore, as for these two categories a winery visit consists a part of an outing, 'Wine Roads' that offer a variety of activities can be attractive to them. Wine tourism marketers should consider which specific types of activities could be offered complementary to the winery visit itself, in order to increase both the visitors' interest and the visitation rates.

However, for the 'Wine lovers' and the 'Neophytes' (which can be potential wine lovers under the right circumstances), the winery appears to be an important determinant

of visitation and taking a wine tour as an 'individual initiative' (Jaffe & Pasternak, 2004). In this case, a winery visit may provide a competitive advantage both for the destination and local wines, creating not only profit for wine enterprises but also opportunities for the development of the regional grape and wine sector. In addition, regarding marketing implications, it is crucial that these types of visitors have the opportunity to learn more about wine through a discussion with the wine maker. Such experiences make the visitors feel special, particularly if they are personally invited to taste a specific wine 'just for them' (Roberts & Sparks, 2006).

Finally, it should be noted that findings have to be dealt with caution and the generalization of conclusions should be avoided, as wine tourists are likely to vary from region to region (Getz et al., 2008). Moreover, limitations exist in terms of the small sample size. Finally, the number of the members of the 'Wine Roads of Northern Greece' has been increasing since the time that the survey had been conducted. Today, the wineries that participate to the network are 38. This means that, given the fact that the wine tourism market, as well as the consumers' characteristics may be different, there is a need for more quantitative research into the winery visitor's profile and motivations.

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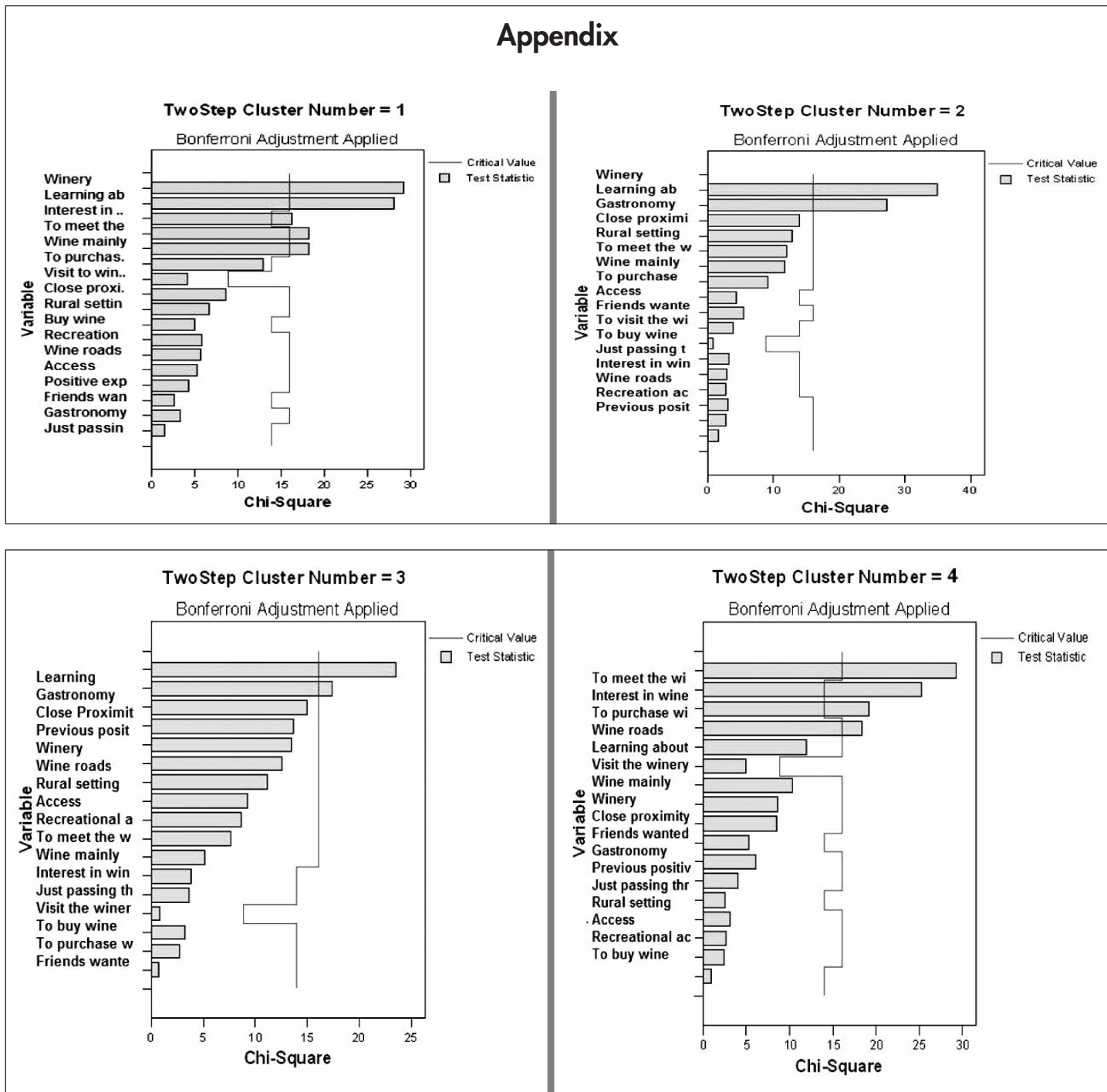
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Appendix



Note: The variables that participated in the Two-step cluster analysis were the following:
 Learning about wine as an incentive to visit the wine region.
 Local gastronomy as an incentive to visit the wine region.
 To visit the winery.
 To meet the winemaker.
 The rural setting as an incentive to visit the wine region.
 To buy wine.
 Just passing through.
 The region offers a wide range of attractions/recreational activities.

Friends and relatives recommended me to visit the winery.
 The winery is in close proximity to home.
 My friends or relatives wanted to come.
 I had a previous positive experience.
 The winery is a member of the Wine Roads of Northern Greece as an incentive to visit the winery.
 The winery can be easily accessed.
 Level of interest in wine.
 Frequency of purchasing wine