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A "blue ocean" strategy for developing visitor wine experiences: Unlocking value in the Cape region tourism market

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ABSTRACT

The metaphor of "Blue Ocean" thinking is used to investigate visitors' preferences for "red ocean" and potential "blue ocean" wine experiences in South Africa's Cape region. A questionnaire was completed by 443 tourists who identified as wine tourists. "Red ocean" activities, e.g., wine estate bus tours were less attractive to tourists than potential "blue ocean" activities, e.g., paired wine and dinner tasting. Such activities are not commonly available at present and represent a significant opportunity. The paper shows how visitor research and fresh strategic thinking can unlock value in the tourism market.

1. Introduction – wine tourism in the Western Cape

South Africa's tourism sector is important to the national economy, in 2016 yielding 9.3% of the national GDP and forecast to rise to 11.5% by 2027 (WT&TC, 2017a). As in other G20 member countries including Australia, Canada, China, India and Mexico, the South African wine sector performed better than the national economy as a whole (WT&TC, 2017b), supporting one in every ten jobs in South Africa. In the Western Cape (hereafter Cape region) in particular, wine tourism is dominant, with 86% of all tourists citing wine as a source of interest (tourismupdate.co.za, 2016). Across the country, this region commands a 64% share of all tourism tours booked nationally and approximately a quarter of all tourism-related spending (tourismupdate.co.za, 2016).

A recent state-sponsored study (exploresideways.com, 2018) revealed that a 'winelands' trip is included in 99% of all Cape Town-based tour itineraries. Further, Kirkman's Cellar Door Research Report on the Stellenbosch Wine Route (2010) reported that 72% of all wine tourists were repeat visitors, with foreign tourists making up 28% of all cellar door visitors. International tourists, mostly from the UK, US, Germany, Netherlands and France, are particularly important to wine tourism as they each spend between R30,000 and R50,000 (equivalent to USD 2000–3500) on flights and accommodation in the Cape (exploresideways.com, 2018).

However, impressive as these figures appear, Cape wine tourism is not as developed and lucrative as it could be. The dominance of two specific offerings – "hop-on-hop-off" buses for individual tourists and wine-tasting bus-tours for groups – have constrained the industry and created over-traded market conditions with little or no 'experience' variation available to wine tourists. Overwhelmingly, the visitor experience offered by these options consists of tasting wines from one wine estate, beginning with the 'sweet whites' and ending with the 'powerful reds', then moving on to other estates for more of the same. This problem has not gone unnoticed. A recent wine-and-food-tourism report (Van der Waal, 2016) asked, for example, whether the development of alternative options could expose visitors to a more varied set of wine experiences, an appeal echoed by the CEO of the region's tourism trade and investment promotion agency Wesgro (tourismupdate.co.za, 2016).

Such calls emanate from a context in which undifferentiated wine-tour businesses are forced to operate in a zero-sum battle for market share. Drawn thus into narrow and hotly contested spaces, tour companies are forced to reduce their prices, steadily competing away their profits in an effort to remain economically viable (see Rangan & Bowman, 2017). Under such undifferentiated conditions consumers are left confused as to how to meaningfully compare visitor experiences and typically default to the cheapest option available (tourismupdate.co.za, 2016). This dynamic ties neatly with Moore's (2004) "main street-decline" stage of a product's life-cycle, where the category is seen as fossilized and customers are actively looking for assistance (Matthyssens & Vandenbempt, 2007). In Cape Town's individual tourist market, the commodified "hop-on-hop-off" buses have come to dominate tourist routes leaving marginal tourist operators to compete purely on price. Consequent attempts to differentiate tourism products and services have become indistinguishable, with all offerings

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appearing merely ‘different in the same way’.

Tourism scholars suggest that numerous consumer-related issues within wine tourism have, as yet, to be formally interrogated (Bruwer & Lesschaeve, 2012) and this is clearly the case in the Cape. As noted by Bruwer (2003:423), “A better understanding of cellar-door visitors to a region would enable wineries to develop more appropriate and improved wine tourism products”. Indeed a number of recent studies suggest that adopting a visitor centered approach would provide a greater range of visitor experiences, cement customer loyalty, influence buyer intention, and increase the relevance of the alcoholic beverage market (see Chen, Goodman, Bruwer, & Cohen, 2016; Kim & Bonn, 2016; Thanh & Kirova, 2018). It is, after all, the customer who drives the business value proposition and who is, therefore, central to any analysis of this nature.

Accordingly informed, this study explores Cape wine tourists’ preferences for a suite of undeveloped and potentially valuable, so-called “blue ocean” wine experiences; a strategic metaphor more fully described in the literature review that follows. These options are simultaneously assessed in relation to the cheap and commodified wine experiences currently available. To date little attention appears to have been given to the viability of hitherto untested alternatives, and in light of the move towards an experience economy where the customer-tourist seeks meaningful engagement with the local wine culture (Cubillas, Mars, Torres, & Sias, 2017, Sigala, 2019a and 2019b), their proper consideration remains a challenge and an opportunity.

2. Research objectives

This research seeks to inform the development of an expanded range of regional wine-tourism experiences by exploring the level of wine tourists’ interest across a suite of real and potential experiences. Such knowledge will help wine tour operators shift practice away from the currently overcrowded market, towards an alternative that is potentially more lucrative, hitherto unserviced, and most importantly, perceived as desirable by wine tourists.

Accordingly, the formal research aims of this study present as follows:

1 To assess wine tourists' support for a range of possible wine related activities
2 To identify the sociodemographic variables associated with different activity preferences, and
3 To explore the sociodemographic variables and activity-preferences associated with different wine tourist segments

3. Literature review

3.1. Wine tourism and wine tourists

Hall et al. (2000) describe wine tourism as a class of special interest tourism. Byrd, Canziani, Hsieh, Debbage, and Sonmez (2016, 20) go further and place the visitor and the visitor experience at the core of their definition, presenting it in terms of someone “who travels to wineries” and “what the wine tourists are experiencing at these destinations”. The notion that the aim of the wine tourist is merely to drink wine has been challenged by a number of studies that demonstrate visitors are typically interested in a wider span of wine-related experiences (Hall & Macionis, 1998; Charters & Ali-Knight, 2002, Hall et al., 2000, Bruwer, 2003, Mitchell & Hall, 2004, Quadri-Felitti & Fiore, 2012; Chen et al., 2016). However, there remain significant research gaps relating to the behaviour and psychographic profile of visitors (Alebaki & Lakovidou, 2011; Tassiopoulos, Nuntsu, & Haydam, 2004). Commonly, most research has investigated supply-side perspectives, focusing on wineries and tour operators rather than on the demand-side perspectives of wine tourists themselves (Alebaki & Lakovidou, 2011).

Demand-side work by Charters and Ali-Knight (2002) focused initially on how a wine tourist's level of interest may serve as a predictor of their intention to visit a wine venue; suggesting, in conclusion, however, that further psychographic detail was required in characterising the wine tourist. Similarly, Alebaki and Lakovidou (2011) suggested that segmenting the wine tourism market through the deployment of various psychographic variables, such as interest and motivations, may yield useful information to better plan and deliver experiences to wine tourists. Such information should inform the promotional strategy of any wine tourist activity, particularly if it relates to the design of strategies seeking to match experiences with wine tourists' preferences (Alebaki & Lakovidou, 2011; Kirkman, 2010).

Carlsen's (2004) review indicated that most of the early wine tourism segmentation studies were descriptive in nature, and did not incorporate systematic analysis to reach their conclusions. Charters and Ali-Knight (2002), for example, identified three segments: wine lover, and its sub-set, the wine connoisseur; the wine interested; and the wine novice. Their study invited subjects to self-classify according to these descriptors, and did not offer estimations of the sizes of each segment. Using the segmentation studies of Hall and Macionis (1998) and Charters and Ali-Knight (2002), Bruwer (2003) demonstrated how South African wine tourists could be segmented into three groups, namely “wine lover”, “wine interested” and “curious tourists”. He derived these groups from 125 face to face interviews with wine estate managers (and not tourists themselves). Employing these categories, Bruwer (2003) determined that the majority of wine tourists to South Africa were wine lovers (53% wine lovers, 28% wine interested and 16% curious tourists).

Relative to the “wine interested” and “curious tourists”, “**wine lovers**” have been described as more likely to be older, with high levels of both income and education and, as such, are likely to want to learn about, taste and buy wines at a winery (Bruwer, 2003; Charters & Ali-Knight, 2002; Kirkman, 2010). With interests predominantly in gaining knowledge about wine and food, they are less motivated by secondary activities located at wine farms, such as museums and shops (Charters & Ali-Knight, 2002). By contrast, “**wine interested**” consumers fit within a moderatetohigh income bracket, tend to be university educated, and consider the opportunity to buy wine as very important, though slightly less so than wine lovers (Charters & Ali-Knight, 2002; Kirkman, 2010). They are interested in knowledge, tasting and the cellaring and aging of wine. Unlike wine lovers, however, they typically would not travel solely for the purpose of engaging in wine tourism (Charters & Ali-Knight, 2002). “**Curious tourists**” have moderate levels of income and education. Though they may purchase at a winery, they are the least likely to make wine-related purchases (Kirkman, 2010). As such, curious tourists would be the least interested in either wine experiences or activities, typically visiting the wine region for a purpose unrelated to wine (Charters & Ali-Knight, 2002).

In terms of Bruwer's (2003) three wine tourist-segments in the Cape, ‘wine lovers’ were shown to have the highest willingness-to-pay, as they were likely to be regular purchasers of wine, wine and food magazines and other wine related items. ‘Wine interested’ tourists were found to be irregular purchasers of wine but with less interest in both food and wine, resulting in fewer related purchases than wine lovers (Charters & Ali-Knight, 2002). Finally, ‘curious tourists’, only occasionally purchased wine, and were satisfied with paying for wine-tasting rather than other wine-related experiences (Bruwer, 2003). Of course, wine tourists' holiday budgets also negatively or positively impact on their willingness-to-pay for wine experiences – not all ‘wine lovers’ are necessarily wealthy (Bruwer, 2003; Kirkman, 2010).

3.2. Red and blue oceans

In the field of business strategy, over-crowded markets have been popularly termed ‘red oceans’, places where operational waters are saturated with the blood of competitive war (Kim & Mauborgone, 2005). In red oceans, according to Kim and Mauborgone (2005, 4) "industry boundaries are defined and accepted and the competitive rules of the game are known." These congested markets are perceived to contrast with so-called 'blue oceans', where uncontested market spaces may be identified with few, if any, competitor businesses. Truly blue oceans, suggests Kim and Mauborgone (2005, 4) are therefore all businesses "not in existence today". Proceeding thus, the challenge for this study is how best to identify such opportunities within the wine tourism sector? This is not easily answered since historically the literature on strategic thinking has concentrated on how best to cope in contested markets, viz., highlighting ways in which to compete better under such conditions. The work of Michael Porter (1980) is an apt example offering instruction on how best to preserve or gain market share under conditions of competition. In contrast, there is marginal insight on how to identify and or create new zones of uncontested market space (Priilaid, 2019), this despite the growing call for social innovation as a component of innovation study (van der Have & Rubalcaba, 2016). Even with the popular insights derived from Kim and Mauborgne's work (2005), some firms believe that it is simply too risky to seek out fresh opportunities (see Matthyssens & Vandenbempt, 2010; Olivia & Kallenberg, 2003). Regardless of the fear of failure, however, the pressure to seek out new innovative strategic spaces is mounting. Across numerous industries, and especially within the wine space, there is both a product surplus and very little market variation: characteristics typical of a red ocean.

According to Kim and Mauborgone (2005), the key to moving away from over-crowded spaces relates to what they term a "strategic move". Critical to this is the notion of "value innovation" a term that places emphasis on the equal importance of both words, *value* and *innovation.* Kim and Mauborgone (2005) observe that it does not help merely to accentuate innovation without the commensurate offering of value. Technocentric offerings tend to confuse the customer if they do not understand the value on offer - the technology overshooting what the buyer would be willing to pay for. Alternatively, creating value without innovation results merely in cost cutting with little or no meaningful value offered to the customer. Cutting prices is a recipe for a red ocean - arguably the very situation currently facing wine-tour operators in the Cape. At present in South Africa, with its relatively weak currency, there are many "vanilla" or generic value-for-money experiences on offer but not a lot of innovation, a condition typically cited in the literature as "service compression" (see Rangan & Bowman, 2017) or "deservitization" (Valtakoski, 2017).

In terms of the above, the "value innovation" concept can only be shown to apply when both utility and value-for-money are coupled with innovation. Firms failing to make this link are likely to find themselves in congested territory. The question is then, what is the best way to test for innovative alternatives in Cape Town's wine tourism sector? Arguably, as Tim Harris, the CEO of the state tourist-agency Wesgro has suggested (tourismupdate.co.za, 2016), it is by departing from the one-size-fits-all tourbus approach and shifting towards a product that offers a form of innovation that the visitor-market understands, values, and is prepared to pay for. Harris has pointed out that tourists are increasingly attracted to the wine and food tourism sector. "Therefore", as he says, "one needs to ensure a high value, unique offering to capture their spend" (tourismupdate.co.za, 2016). In the literature, this injunction aligns with calls for various industries to transit from an emphasis on products to one of services. Kowalkowski, Gebauer, Kamp, and Parry (2017), for example, observe terms such as "service infusion", "service development", "service growth", or straight "servitization".

Based on the preceding discussion, we therefore position the "red ocean" metaphor as a descriptor for the currently dominant set of generic wine tour products such as the hop-on-hop-off buses. By contrast, we use "blue ocean" to denote hypothetical business offerings that offer a degree of personalized service to the wine tourist. The operationalization of these terms is subsequently described in the Method section.

3.3. The experience economy and wine tourism

It is now worth considering how blue ocean thinking relates to the literature on the experience economy as developed over the last two decades by scholars such as Pine and Gilmore (1998), and more recently, de Charnatony, Harris, & Riley, 2000; Matthyssens & Vandenbempt, 2010; Kowalkowski, Windahl, Kindström, & Gebauer, 2015; and Thanh & Kirova, 2018, among others. Collectively, their central insight is that fresh business models provide additional value when they transform commodities to goods, or goods to services, or services to experiences. This process of ongoing adaptation entails a level of customization that, while occurring along different classes of growth trajectory (Kowalkowski et al., 2015), in the main, generate progressively differentiated experience offerings at steepening price points.

Such insights make compelling sense in the wine tourism sector (see Quadri-Felitti & Fiore, 2012; Thanh & Kirova, 2018) where the trend should be to move away from commoditized offerings like mass volume bus-tours towards tour-offerings that are customized for, or even by, the end user. An industry's shift away from commoditization due to worsening commercial performance, and ultimately a profit squeeze, is a scenario well described by Matthyssens and Vandenbempt (2010). Any consequent attempt to de-commoditize by means of some level of service innovation and customer bonding requires a deep understanding of the customer: who they are, why they are here and what they desire. Accordingly, in the process of thinking about and designing innovative strategies for the wine tourism market, it is important to consider each option or business offering from the visitor's perspective. Getting this right will catalyze value for the tourist and profits for the business concerned. Properly considered, it also adds diversity to the market, connecting with hitherto 'unattended' potential visitor groupings and growing the tourist pie as opposed to fighting for 'scraps' in a static zero-sum market (Kim & Mauborgone, 2005).

From a managerial perspective it is worth considering therefore how best so-called blue ocean activities may be designed. Here the four realms of experience as detailed by Pine and Gilmore (1998) are especially useful. To elaborate, Pine and Gilmore (1998, 102) describe a two way experience continuum spanning (1) passive and active end-user participation, and (2) an environmental absorption and immersion (with absorption occupying a tourist's attention, but immersion requiring a full release of self into the experience). The overlay of these continua configure a 2x2 matrix with four quadrants of tourist activity, namely: *entertainment* (passive absorption), *education* (active absorption), *aesthetics* (passive immersion) and *escapism* (active immersion).

As per Quadri-Felitti and Fiore (2012) and Thanh and Kirova (2018), a wine tourism experience, may, for example, be enjoyed as a form of entertainment (such as wine blending, a music concert, or heritage site visit), or as a basis of learning (such as home wine making lessons, a tasting masterclass with a local expert, or a cooking or craft making class). Alternatively, it may be experienced in an aesthetically beautiful environment (such as a picnic on an estate, or enjoying vineyard roads) or as a form of escapism (such as a barefoot wine stomping, hot air ballooning or vineyard hiking). Through this four-way framework, it can be seen how "sweet spot" wine tour activities can be designed in a number of different ways. Service management theory (Matthyssens & Vandenbempt, 2010) suggests that the more these activities avoid the one-size-fits-all format and tend rather towards customized, transformational experiences, the more tourists will be inclined to engage with them. The key challenge facing Cape wine tourism is thus to design new visitor-informed wine experiences that transition from the present deservitized format to an alternative range of innovative visitor wine experiences.

Table 1
Questionnaire details.

Socio-demographic characteristics	• Sociodemographic characteristics elicited in the questionnaire included age and gender; whether they were domestic or international tourists; the nature of their visit (as a member of an organised tour or as an independent traveller); self-assessed knowledge of wine (on a four-point scale from 'not knowledgeable' to 'extremely knowledgeable'); membership of a wine club/society (yes/no); previous attendance of wine-events (yes/no); and interest in undertaking wine tourism experiences (on a four-point scale from 'not really interested' to 'extremely interested').
Interests	• Interest and engagement in wine consumption and wine education were ascertained using seven "yes/no" items: whether the respondent often drinks wine at home and in restaurants (two items); and whether the respondent was interested in various aspects of learning or gaining knowledge about wine (five items).
Activity-preferences	• Ten wine-related activities were identified and classified as either red or blue-ocean. • Blue ocean activities were classified as relatively new and untested in the market, offering a degree of novelty and customization (Kowalkowski et al., 2015). • Eight blue ocean activities were listed, covering a range of innovative wine experiences not commonly available in the Cape. • These included: a three-course dinner incorporating 'paired' wines hosted by a local wine-expert, a selected tasting of the best wines of an estate or a number of examples of a wine type from a region or a small-group wine tasting 'master-class' incorporating top local wines with gourmet food and conducted by a wine-expert. • Red ocean activities were identified as already entrenched in the market and typifying a low value, mass-market orientation (Valtakoski, 2017). • Two "red ocean" activities were identified: an afternoon on a '"hop-on-hop-off"' wine-tour-bus; and visiting a number of wine estates on a tourist-bus where you can taste a wide selection of wines available at each. • Preferences for each of these ten activities were measured using a 7-point scale from "not at all attractive" to "extremely attractive".
Willingness-to-pay	• The same 10 items above were presented to respondents once more, this time asking how much they would be willing to pay for each experience. • Six payment price-bands were offered as response options, ranging between R100 and R5000 (USD 7–35). Such scales are often employed to determine the price-point for indicated activities such as those associated with the wine tourist experience (Breidert, Hahsler, & Reutterer, 2006).

4. Method

4.1. Participants and procedures

A total of 443 wine tourists completed a paper-based questionnaire either in Cape Town (administered at the Victoria and Alfred Waterfront and the Table Mountain Cableway) or in the wine tourism areas of Constantia, Stellenbosch and Franschhoek. Focusing data-collection efforts on these popular wine producing areas enabled wine tourists to be targeted. With the permission of winery owners and/or managers, the self-completed survey was administered at various intercept points in the winelands. Two screening questions ensured that respondents were tourists to the Cape region and sought out wine tourism experiences, e.g., visited wineries or vineyards when travelling. Only adults, ≥18 years, were included in the survey.

The questionnaire was pre-tested with a convenience sample of 15 respondents selected from Cape Town's High Constantia winery. These results were not included in the final tabulation. Subsequently, over a period extending from February to August 2017, questionnaires were administered at the various data-collection sites.

4.2. Instrument

The questionnaire was made up of various sections, including sociodemographic characteristics, interests, activity-preferences and willingness-to-pay. These are presented in Table 1 below.

4.3. Data analysis

For research objective 1, descriptive statistics were calculated to report the level of tourist support for different wine-related activities. Willingness-to-pay was also analysed descriptively (using the median) in order to provide a broad overview of the relative value visitors placed on different options. For objective 2, the sociodemographic variables associated with different activity-preferences were explored using regression analyses. The top preferences for each of 21 different demographic classifications were also identified. Finally, for objective 3, a hierarchical cluster-analysis (Ward's method) was performed using the seven "yes/no" items measuring interest and engagement in wine consumption and wine education, in order to identify discrete groups with similar wine-related interests. Cluster solutions from two to four

Table 2
Wine tourism activities in decreasing order of attractiveness.

	Mean level of attractiveness (1–7 scale)	% rated as extremely attractive (7)	Amount at least 50% are willing to pay
Blue Ocean activities			
A three-course dinner incorporating 'paired' wines hosted by a local wine expert.	5.43	25.3	R401-800
A picnic with wines at a wine estate.	5.38	21.7	R201-400
A selected tasting of the best wines of an estate or a number of examples of a wine type from a region.	5.37	15.3	R401-800
A music concert and wine-tasting at a wine estate.	5.30	16.9	R401-800
A small group, cellar tasting-tour conducted by the wine maker.	5.28	18.3	R401-800
Visiting a wine estate for reasons other than just for wine-tasting, e.g., for coffee or cheese tasting.	5.14	19.0	R401-800
A small-group bus-tour of three wine estates including tasting with an 'expert'.	5.06	14.7	R401-800
A small-group wine tasting 'master class' incorporating top local wines with gourmet food and conducted by a wine-expert.	5.00	13.5	R401-800
Red Ocean activities			
Visiting a number of wine estates on a tourist-bus where you can taste a wide selection of wines available at each.	4.92	13.5	R401-800
An afternoon on a 'hop-on-hop-off' wine-tour-bus.	4.76	11.1	R201-400

clusters were examined in terms of their sociodemographic characteristics and wine tourism activity-preferences and the three-cluster solution was found to be the most meaningful.

5. Results

Of the 443 participants who completed the questionnaire, 23% were visiting from others parts of South Africa, 7% from elsewhere in Africa, and 70% from outside of Africa. Participants were largely aged under 30 (46%); 20% were between 31 and 40, 10% between 41 and 50, 13% between 51 and 60, and 11% over 60 years. Males comprised 45%, and females, 55%.

5.1. Assessing wine tourists' support for a range of possible wine related activities

Wine related activity-preferences, together with the price-bracket within which most were willing to pay for these activities are reported in Table 2. The two "red ocean" options were rated as the least attractive overall, and were considered "extremely attractive" by only 13.5% of respondents. The "hop-on-hop-off" wine tour was significantly less attractive than all other items (paired samples t (442) $\geq$ 2.464, $p \leq .014$). The most attractive innovative service activities were a three course dinner incorporating paired wines hosted by a local wine expert, and a picnic with wines at a wine estate. Both were considered extremely attractive by more than 20% of all respondents. Analysis suggested that most wine tourists would be willing to pay at least R400-800 (USD 28–57) for all of the activities except the hop-on hop-off bus and the wine estate picnic, for which most people were willing to pay at least R200-400 (USD 14–28).

5.2. Identifying sociodemographic variables associated with different activity-preferences

A series of regression analyses was performed to identify which of the sociodemographic variables were associated with different preferences. Each regression analysis examined one of the ten activities, with rated level of attractiveness of the activity entered as the dependent variable, and the eight sociodemographic variables entered as predictors, i.e., age group (5 categories, from 1 = under 30 to 5 = over 60); gender (2 categories, 1 = male; 2 = female); tourist-type (2 categories, 1 = domestic; 2 = international); group-type (2 categories, 1 = tour-group, 2 = independent traveller); self-assessed knowledge of wine (4 categories from 1 = not knowledgeable to 4 = extremely knowledgeable); membership of a wine club/society (2 categories, 1 = yes, 2 = no); previous attendance of wine events (2 categories, 1 = yes, 2 = no); and level of interest in undertaking wine tourism experiences (4 categories from 1 = not really interested to 4 = extremely interested). All predictor variables were entered together. Table 3 reports the results and identifies all predictors with significant regression coefficients ($p < .05$).

The respondent's level of interest in undertaking wine tourism experiences was overwhelmingly the most important predictor of how attractive they considered each of the activities to be ($\beta > 0.20$ for 8 of the 10 items). Following interest, tourist-type was the next most influential, with domestic tourists giving higher ratings than international tourists for most activities. Females, and those who did not belong to a wine club, were more likely to find a music concert attractive; those who had previously attended wine-events were more likely to find a small group, wine cellar tasting tour conducted by the wine maker attractive. Those with a greater knowledge of wine were less likely to enjoy the generic option of visiting a number of wine estates on a tourist-bus.

To explore these findings from a different perspective, the top preference of each demographic group was examined in turn. Table 4 reports the results. (Only groups with at least 30 respondents are

Table 3
Sociodemographic variables associated with different activity-preferences.

Dependent variable: rated level of attractiveness of each activity	Independent (predictor) variables								Statistics for each regression analysis
	Age	Gender M/F	Tourist D/I	Group T/I	Knowledge 1–4	Club Y/N	Events Y/N	Interest 1–4	
Blue Ocean activities									
A three-course dinner incorporating 'paired' wines hosted by a local wine expert.			-.096*					.254***	F (8, 433) = 6.847, p < .001; Adjusted R^2 = .096
A picnic with wines at a wine estate.			-.149**					.314***	F (8, 433) = 8.116, p < .001; Adjusted R^2 = .114
A selected tasting of the best wines of an estate or a number of examples of a wine type from a region.								.281***	F (8, 433) = 7.288, p < .001; Adjusted R^2 = .102
A music concert and winetasting at a wine estate.		.167***	-.133**			.122*		.241***	F (8, 433) = 7.822, p < .001; Adjusted R^2 = .110
A small group, cellar tasting-tour conducted by the wine maker.							-.113*	.252***	F (8, 433) = 5.185, p < .001; Adjusted R^2 = .071
Visiting a wine estate for reasons other than just for winetasting, e.g., for coffee or cheese tasting.								.166***	F (8, 433) = 2.923, p < .01; Adjusted R^2 = .034
A small group bus tour of three wine estates including tasting with an 'expert'.			-.120*					.266***	F (8, 433) = 6.073, p < .001; Adjusted R^2 = .084
A small group winetasting 'master-class' incorporating top local wines with gourmet food and conducted by a wine-expert.			-.172***					.319***	F (8, 433) = 10.571, p < .001; Adjusted R^2 = .148
Red Ocean activities									
Visiting a number of wine estates on a tourist-bus where you can taste a wide selection of wines available at each.			-.115*		-.120*			.265***	F (8, 433) = 5.696, p < .001; Adjusted R^2 = .078
An afternoon on a 'hop-on-hop-off' wine-tour-bus.								.135**	F (8, 433) = 1.652, p = .108; Adjusted R^2 = .012

Reported are β values with $p < .05$ * p < .05; **p < .01; ***p < .001.
M/F = Male/Female, D/I = Domestic/International, T/I = Tour-group/Independent, Y/N = Yes/No, with coded values reflecting the stated order).

Table 4
Top activity-preferences (rated as most attractive) of different sociodemographic groups. (TP = Top Preference).

	A three-course dinner incorporating 'paired' wines hosted by a local wine-expert.	A picnic with wines at a wine estate.	A selected tasting of the best wines of an estate or a number of examples of a wine type from a region.	A music concert and winetasting at a wine estate.	A small group cellar-tasting-tour conducted by the wine-maker.
Age < 30	TP				
Age 31–40	TP				
Age 41–50			TP		
Age 51–60		TP			
Age 61 +				TP	
Males	TP				
Females	TP				
International Tourists			TP		
Domestic Tourists		TP			
Tour groups	TP				
Independent tourists	TP				
Very Knowledgeable	TP				
Somewhat Knowledgeable		TP			
Low Knowledgeable		TP			
Member of a wine club					TP
Not a member of a wine club	TP				
Have attended specialized wine-events			TP		
Have not attended specialized wine-events		TP			
Extremely Interested		TP			
Very Interested	TP				
Somewhat Interested		TP			

included). Wine activities 1 to 5 (all blue ocean) were the only options rated as the most preferred. None of the remaining activities featured as top preferences and are not included.

5.3. Categorizing sociodemographic variables and activity-preferences associated with different wine tourist-segments

A cluster analysis was conducted based on the seven dichotomous items measuring interest and engagement in wine consumption and wine education. Three visitor groups were identified with shared interests in relation to wine, namely, *wine enthusiasts*, *wine consumers* and *wine explorers*. These three groups were then compared in relation to their demographic characteristics and wine tourism activity preferences. The three groups noted here are in some respects similar to the classification of wine tourists outlined by Hall and Macionis (1998) and Charters and Ali-Knight (2002), but were here derived empirically from participants' responses.

Cluster 1: Wine enthusiasts. This group includes approximately 32% of participants. These people like everything about wine and are very interested in wine tourism experiences. They are comparatively more knowledgeable about and experienced with wine, more likely to be part of a wine club and attend specific wine events. They tend to be slightly older compared with the other two clusters, with a higher proportion aged over 40. They find most wine tourism experiences more attractive than the other two clusters. Their preferred activities are a:

- three-course dinner incorporating 'paired' wines hosted by a local wine expert;
- selected tasting of only the best wines of a wine estate or a number of examples of a wine type from a region, e.g., Shiraz;
- small group, wine cellar tasting-tour conducted by the wine maker;
- music concert and wine-tasting at a wine estate and
- picnic with wines at a wine estate.

Cluster 2: Wine consumers. This is the largest group, including 48% of all research participants. These people enjoy drinking wine but are not greatly interested in learning about it. They consider themselves "somewhat knowledgeable" about wine; have a moderate interest in wine tourism; but no real interest in wine education. This cluster group is mostly under 40 years of age. It is the group most likely to be part of a tour-group. Their preferred activities are a:

- picnic with wines at a wine estate;
- selected tasting of only the best wines of a wine estate or a number of examples of a wine type from a region, e.g., Shiraz;
- three-course dinner incorporating 'paired' wines hosted by a local wine expert;
- small group, wine cellar tasting-tour conducted by the wine maker; and
- music concert and wine tasting at a wine estate.

Cluster 3: Wine explorers. This is the smallest group and includes 20% of participants. These people have some interest in learning about wine, but are not high consumers. Most do not drink wine either at home or at restaurants. This group has the highest share of younger (aged under 30) travelers. They do not consider themselves to be knowledgeable about wine, are not likely to be members of wine clubs, and have not previously attended wine events. They have the lowest interest in wine tourism out of all the clusters hence the majority of wine experiences are rated lower. Their preferred activities are a:

- music concert and wine tasting at a wine estate;
- three course dinner incorporating 'paired' wines hosted by a local wine-expert;
- picnic with wines at a wine estate;
- small group, wine cellar tasting-tour conducted by the wine maker; and
- visiting a wine estate for reasons other than just for wine tasting, e.g., for coffee or cheese tasting.

6. Discussion: developing blue ocean wine tourism experiences in the Cape region

As a central jewel in South Africa's tourism crown, Cape wine tourism should be striving towards a level of service offering that connects properly with its customer base. In particular, the sector should be seeking to offer experiences that most appeal to wine tourists. Right now, however, the available suite of options is overwhelmingly generic in character, offering a commodity type service focused on maximizing visitor numbers and wine sales rather than on providing personalized experiences and developing wine education experiences. This is akin to the "deservitization" phenomenon, with cheaper complementing standardized offerings negating any attempts at customization and value added solutions (Matthyssens & Vandenbempt, 2007; Kowalkowski et al., 2017). Here firms select initially to move into customer-facing services that require a degree of customer connectedness but then gravitate towards less demanding commodity-type service offerings, such as the hop-on-hop-off busses (Cusumano, Kahl, & Suarez, 2015; Valtakoski, 2017).

Imaginative new visitor experiences need to be designed to grow the market, increase repeat visitation and visitor spend. To achieve such outcomes, operators urgently need to invest in researching the needs and preferences of their wine visitors.

Cognizant of the above, and of the importance of wine tourism to national development, this research investigated whether individual visitors and tourist groups wanted a range of wine tourism experiences beyond those offered by the ubiquitous red buses and vanilla three-stop tour-bus options. To develop a viable line of enquiry, we sought to establish a range of real and imagined wine-related activities that Cape wine tourists might find appealing. Data analysis sought to identify the wine-related activities that were most preferred by potential visitors, how much people were willing to pay for them, and ways in which these varied according to sociodemographic variables.

Overall, this study's findings relating to the three visitor clusters (enthusiast, consumer and explorer) correspond well with the findings of Hall and Macionis (1998) and subsequently Bruwer (2003), the latter of which identified "wine lovers", "wine interested" and "curious tourists". Importantly none of the clusters in this study revealed any inclination towards the ubiquitous "hop-on-hop-off" and/or tour-bus phenomena, though seemingly, wine tourists are defaulting towards these options because there is little or nothing else available, again confirming the hegemony of deservitization that confounds much of the Cape's wine tourism economy. Across all visitor clusters, these red ocean offerings are clearly not meeting wine visitor needs as they were rated the lowest in the set of possible wine experience options.

The three highest ranked wine tourism activity preferences focused on visiting in smaller groups, and involved experiences such as three-course dinners with paired wines hosted by local experts, picnics at a wine estate and selected tastings of only the best varietal wines available from the region. These more enticing options were especially attractive to knowledgeable "wine enthusiasts", as was the 5th rated option: a small group cellar-based tasting hosted by the wine-maker.

In comparison, those in the "wine consumer" visitor-cluster were less interested in learning about wine. These travelers considered themselves to be "somewhat knowledgeable" about wine and although they indicated their preference for the same three wine experience-options above, they also preferred the option of attending a wine estate music concert, an option that ranked 4th on the overall list of preferences.

The third cluster, viz., "wine explorer", incorporated typically younger travelers with a developing appreciation for wine. Overall, explorers' ratings of the suggested "blue ocean" wine experiences were lower than for the other clusters. Findings revealed that explorers' favorites included a mixture of the preferences of both the "consumers" and "enthusiasts" (wine paired dinners, tasting high quality wines, picnics and concerts) as well as interest in visiting wine estates for reasons other than just for wine tasting, e.g., for coffee or cheese tasting.

World over however, many non-wine drinkers find the culture of wine drinking pretentious and off-putting, the development of Australia's Yellowtail wine brand aimed at American beer drinkers being a well publicized case in this respect (Kim & Mauborgone, 2005). Recent comments by Najib Balala (Fin24, 2018), Kenya's cabinet minister for tourism, highlight the significant opportunities for the South African wine tourism industry to connect with local and continental African tourists in ways that offer memorable experiences. Balala notes that education remains the key - there is simply insufficient work being done to present wine to African non wine drinkers in ways that are non-threatening, educational, and emotionally connecting (Fin24, 2018).

The analysis of Cape wine visitors' willingness-to-pay for experiences suggests that with the exception of picnics and "hop-on-hop-off" bus trips, wine tourists would be more than happy to pay up to R800 for imaginative, customized experiences. Given the fragility of the local currency, it is likely that this price-ceiling will rise further with time. Providing some of the highest rated visitor blue ocean experiences identified in this research - for instance sampling top-rated wines across estates and regions - would shift the industry away from the highly contested, low value experiences towards the design and provision of servitized options offering greater value *and* innovation. Specially crafted experiences tailored for, or even by, visitors are generally highly valued and premium prices may be charged.

Between the metaphorical red and blue oceans lies a middle ground for the development of specialist wine tourism experiences, especially for those in the "wine consumer" and "wine explorer" clusters. Within this mid-tier market, there is seemingly growth potential particularly through the development and promotion of picnics and musical events at wine estates. As observed in the literature, there are many benefits to adding complementary tourist-related wine activities and services. These include the cementing of brand loyalty, growing a constructive view of wine and secondary products, developing consumer awareness and acceptance, and improving tourist relationships through direct engagement (Asero & Patti, 2011; Bruwer & Alant, 2009; Matthyssens & Vandenbempt, 2007; Quadri-Felitti & Fiore, 2012; Chen et al., 2016). There is also broad visitor appeal for focused, personal, bespoke wine events aimed at individual tourists who want more specialized experiences - for example - a helicopter trip over the winelands offering three stop overs with wine tastings, food pairings, and cellar tours included.

7. Conclusion

From a theoretical perspective, the findings of this study are consistent with the preference clusters noted in work by Charters and Ali-Knight (2002) and Bruwer (2003). More so, they extend the work of these papers by offering an empirical segmentation of wine tourists and an analytical appraisal of the demographic characteristics and activity preferences of each segment. From the extent of our research, the linkage of visitor clusters to wine tourism activity and experience preferences has not been made before, and certainly not within the South African wine industry. This is one of the useful contributions of this paper. Moreover, with recent wine tourism literature lamenting the paucity of practical research demonstrating how to develop wine tour activities connecting tourists to wine experiences for the purpose of co-creating value (as per Joy, Belk, Charters, Wang, & Peña, 2018, Black & Gallan, 2015 and Sigala, 2019b), through the lens of blue ocean thinking, we believe our paper also offers a sound contribution to identifying meaningful alternatives to the trend of deservitization.

Here specifically, our study tested and demonstrated tourist support for a range of possible wine-related activities and identified those sociodemographic markers associated with different wine experience preferences. It also identified which demographic markers and activity preferences matched different wine tourist-segmentations. In so doing, we found that while most of the desirable wine activity-preferences were hitherto undeveloped "blue-ocean" activities, the majority of those currently in existence are generic, volume-driven, and less popular. This key finding touches on a central theoretical tenet of wine tourism marketing, which should be to offer a suite of experiences that most appeal to visitors. If current tourism options do not fulfill this role, the risk is that potential customers will go elsewhere in search of alternative experiences that speak more directly to their needs and desires.

The generation of blue ocean activity options is also critical to job creation, especially since wine tourism is played out across much of the Western Cape. This research should therefore serve to guide the wine tourism industry in reaching informed conclusions about commercial strategies and marketing goals. The promotion of genuine, authentic and immersive wine tourism experiences presents significant market opportunities especially if driven by private operators and industry experts with the requisite level of insider knowledge and insight. Through experience expansion via the four E's of education, escapism, entertainment and aesthetics, fresh tourism and hospitality opportunities may well present themselves to new entrepreneurs, sparking further waves of tourism-product development. Here, for example, tourism targeted at township-based vineyards and wine-making could well flourish along with tours of long forgotten century old mountain vines that produce low yields of incredibly high quality wine. The key here is creative thinking, forging hitherto unconsidered linkages between the curious tourist and the landscape of wine.

7.1. Limitations

This exploratory research tested market appetite for freshly customized wine tourism offerings. While our results provide preliminary evidence that such an approach is useful, they need to be further tested and expanded using a range of complementary data collection methods. Due to the unique characteristics of the region, the findings cannot be applied to other markets. The use of a non-probability sampling method further limits the conclusions that can be drawn regarding the size and replicability of the segments identified in the study.

7.2. Future research

Further work is required to explore the outlined possibilities of blue ocean wine tourism experiences, some of which appear in this study. As per Sigala (2019b, 323), wine tourist value should be "dynamically co-created, debated and emerging through the interactions amongst all wine tourism stakeholders that are facilitated and take place within the cultural winescape." So crafted, such wine tourism experiences would attain the "life enriching and life affirming" consequences of a normative cultural ecosystem service (Fish, Church, & Winter, 2016, 208), and so doing, encompass "a broad symbolic, experiential and virtuous realm of human interactions and understandings of the natural environment" (Fish, Church, & Winter, 2016, 208).

The challenge, in these terms, is of attracting and engaging tourism operators who, given the opportunity, would design and provide tourists with a choice of interactive and vitalizing activities. Currently, the aspirations of wine tourists do not appear to be well considered, or if they are, the imagination required to reach out and connect with them is simply not present. Instead, the Cape wine market appears dominated by an ossified set of business models that while profitable, could be serving the sector so much better if they sought a more innovative basis of operation. While key stakeholders such as *Wesgrow* are becoming increasingly concerned, unless the sector takes up the tools that will equip them to change, the status-quo will remain.

Finally, blue ocean thinking should become part of the vocabulary of tourism managers in the wine sector. Tour operators need to think about being "different in a different way": looking towards designing visitor experiences offering value-innovation, providing potential customers with experiences that align with their interests, motivations, and wallets. The pursuit for innovative service-driven opportunities is unending, and the possibility of investigation along the routes showcased in this study offers fertile grounds for imaginative enquiry and the resultant growth and maturity of the wine tourism market in the Cape region.

Declaration of competing interest

None.

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