

# Key success factors of managing the Robertson Wine Festival

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The Robertson Wine Festival is one of South Africa's largest wine festivals. The uniqueness of this wine festival is that it takes place on an existing wine route and 48 wine farms actively participate. This article presents the results of a survey conducted during the festival in June 2009, when visitors to the festival completed 450 questionnaires. The article aims to identify the key success factors of managing a wine festival. A factor analysis was used to analyse the data. The results identified seven key success factors that managers must consider when organising a successful wine festival.

## Sleutelfaktore in die suksesvolle bestuur van die Robertson Wynfees

Die Robertson Wynfees is een van Suid-Afrika se grootste wynfeeste. Die uniekheid van hierdie wynfees is dat dit op 'n reeds bestaande wynroete plaasvind waar 48 wynplase aktief deelneem. Die doel van die artikel is om die sleutel suksesfaktore te identifiseer wat belangrik is wanneer 'n wynfees bestuur word. 'n Vraelysopname is gedurende die fees in Junie 2009 gedoen, waar besoekers aan die wynfees 450 vraelyste voltooi het. 'n Faktoranalise is gebruik om die data te analiseer. Resultate toon dat bestuurders sewe sukses sleutelfaktore in ag moet neem wanneer 'n wynfees suksesvol organiseer word.

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The nature of the wine industry lends itself to a marriage with tourism (Bruwer 2003: 423). Both industries' products consist of physical components (vehicles, wine, accommodation and food), a service component (deliver quality service) and an experience (Saayman 2001: 7). This marriage results in wine tourism. Wine tourism has been extensively researched in various regions of the world.<sup>1</sup> However, there appears to be a paucity of research into the key success factors that could assist event organisers to manage the visitor's experience at a wine festival. The latter is important because wine tourism is an "experience" either of the wine or the destination or the opportunity to learn and "grow" (Sparks 2007: 41). Wine is associated with communing with others, relaxing, learning about new things, complementing food and, most important of all, hospitality. Creating key experiences for tourists is vital for the sustainability of the attraction/product or event. Wine tourism implies activities and motives, such as visiting vineyards, wine festivals, wineries and wine shows, where the visitor's prime motivating factors are wine tasting and/or experiencing a wine region's attributes. More comprehensively, wine tourism is considered a combination of consumer behaviour, a destination development strategy, and a marketing opportunity for the wine industry (Poitras & Getz 2006: 426). Visiting wine festivals is an important component of the complete construct of wine tourism (Sparks 2007: 41), and wine festivals play an important role in positioning a wine region (Bramble *et al* 2007).

Currently, in South Africa, the active development of tourism routes involves linking the tourism resources of an area in order to market them as a single tourism destination or region. Examples of tourism routes include the Garden Route and the Heritage Route. Applying this model, wine-growing regions have developed various wine routes such as the Stellenbosch, Franschhoek, Paarl, Route

1 For example, Australia (Dowling & Carlsen 1999, Jordan *et al* 2007), Canada (Bramble *et al* 2007, Williams & Dossa 2003, Hashimoto & Telfer 2003), Chile (Sharples 2002), France (Frochot 2000), Hungary (Szivas 1999), Italy (Pavan 1994), New Zealand (Mitchell 1999, Mitchell & Hall 2003), Spain (Gilbert 1992), South Africa (Preston-Whyte 2000, Bruwer 2003, Demhardt 2003), USA (Skinner 2000); and the UK (Howley & van Westering 2000).

62 and the Northern Free State wine routes (Lourens 2007: 476). The growth in wine routes and festivals can be explained by the extremely competitive wine industry in South Africa and globally. For example, in 2005, there were approximately 4360 wine producers and 580 cellars in South Africa, most of which are located in the Western Cape province, with some in the Northern Cape and Free State. These wine farms produced 905 million litres of wine, brandy and grape juice concentrate from a harvest of 1.3 million tons of grapes, making South Africa the world's eighth largest wine producer (SAWIC 2007). This harvest produced approximately 700 million litres of drinking wine, of which 36% was red and 64% white wine. While global wine production has declined over the past two decades, the share of wine production traded internationally has more than doubled. Economically, the wine industry contributed an estimated R16.3 billion to South Africa's gross domestic product (GDP) in 2003. When tourism is included, this figure rises to R22.5 billion.

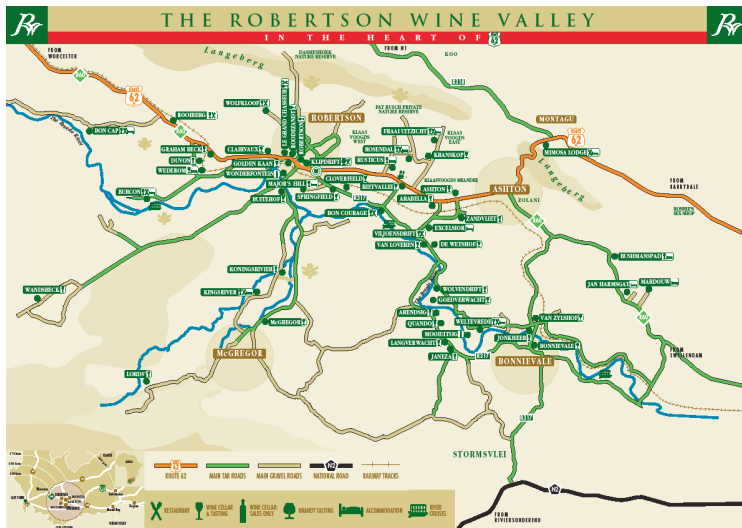


Figure 1: Map of the Robertson Wine Valley  
Source: Robertson Tourism Office

The increase in wine routes has led to a growing number of wine festivals, of which the Robertson Wine Festival is South Africa's largest regional one. The Robertson Wine Festival (*cf* Figure 1) started in 2004 with just 2500 visitors and has, over the past five years, increased significantly, attracting up to 16.000 visitors in 2008. It was the first wine festival to adopt a decentralised approach, meaning that the festival takes place at the various wine cellars (148 wine farms), and a wide variety of supporting activities (Anon 2009).

In order for the Robertson Wine Festival to remain competitive, event managers must think ahead and identify key issues or key success factors (KSFs) when managing this event (Shone & Parry 2004: 81). In addition, according to Allen *et al* (2002: 134), event managers need to have a clear understanding of why the event exists, what its goals are, and for whom it is being organised. The wine route and event must be concerned with long-term economic sustainability because of the increasing competition from other destinations and routes (Poitras & Getz 2006: 425). To achieve this, identifying key success factors is paramount (Van der Westhuizen 2003: 14). This article aims to determine the key success factors of managing the visitor experience needed when organising a successful and sustainable wine festival.

## 1. Literature review

Increased competition is inevitable, given the growing number and diversity of festivals. The competitive positioning of wine tourism regions has become strategically important, as the number of wine festivals has increased considerably and numerous regions are now aggressively marketing themselves to attract high-yield wine tourists.<sup>2</sup> Organisers are seeking a competitive advantage to ensure their festival's success and survival in the tourism industry (Weiler *et al* 2004: 3). Jordan *et al* (2007) found that collaboration between wine producers contributed directly to the success of the wine industry in Australia. Applying a similar

2 *Cf* Charters & Ali-Knight 2002, Mitchell & Hall 2001a & 2001b, Mitchell *et al* 2000.

approach, the Robertson Wine Festival uses the festival as a way of achieving greater collaboration. In fact, a report into the supply aspect found that collaboration was one of the festival's key success factors (Anon 2009).

When managing events, Shone & Parry (2004: 81) emphasise that the event manager must plan and identify the event's key management issues, which requires a systematic approach that breaks the event plan into smaller sections. Thompson & Strickland (1999: 96) define key success factors (KSFs) as "concerns that every manager within the tourism industry must be competent at doing or must concentrate on achieving in order to be competitively and financially successful". De Witt (2006: 9) states that KSFs are a prerequisite for the success of any event and points out that many factors play a role in hosting an event. Various role players, of whom the visitor is the most important, are also involved (Pissoort 2007). It is therefore imperative that event managers understand the visitors to their festival. This implies understanding the factors that influence the visitor's experience (Kruger 2009). Managers need to examine an event not merely from both the supply and the demand aspects (Getz & Brown 2006). A wine festival's ultimate aim is to increase wine sales and to satisfy visitors' needs by creating an exceptional experience. A satisfied visitor will most probably return and sell the event by word of mouth, endorsements, referrals and repeat visits, which ultimately affects the competitiveness and profitability of events (Žabkar *et al* 2010). One way of addressing this challenge is to find out what visitors consider important, since most of the research conducted on this topic concerns the supply aspect. This event literature reveals numerous aspects that are key to the success of the event, for example restaurants and dining, wine touring, tasting and cellar door sales, education about the wine and interpretation, hospitality and accommodation, other tourism attractions, information about the wine, and selling of local handcrafts, art and speciality foods (Hoeksema 2008: 7). The Robertson Wine Festival offers these aspects (and more), but the question remains: are these the most important aspects for visitors to this festival?

According to Getz & Brown (2006: 148), four key developments are important when organising a wine festival: the number and quality of participating wineries, the number and quality of restaurants, the local use of products in the area, and basic tourism infrastructure such as accommodation and customer service. They found that food and wine are the most important factors for attracting visitors to the wine festival. While the latter may seem logical, hosting a successful event year after year is not as simple as it appears (Kruger 2009). Key success factors differ from one event to the next. Therefore whatever works for one event cannot simply be transferred “as is” to the next (*cf* Hoeksema 2008, Getz & Brown 2006). This dilemma prompted this research.

Table 1 gives an overview of the previous studies that focus on specific key success factors in tourism. The visitors’ and the tourism industries’ perceptions of critical success factors appear to be different in terms of products (for example, weddings, guesthouses and conferences) and sectors (for example, tourism, sport and transport sector) (Getz & Brown 2006: 156).

Table 1: Studies conducted on key success factors

Area of research	Researchers	KSFs
Event management and events tourism	Getz (1997)	Find a suitable venue for the event Have suitable facilities that meet the event’s criteria Ensure that the venue (wine farm) is accessible Ensure high levels of hygiene Pay attention to food safety requirements Ensure a safe environment Manage crowds Apply risk management to all aspects of the event Provide quality service Implement an emergency response process

Area of research	Researchers	KSFs
Key success factors for developing and managing a guesthouse	Van der Westhuizen (2003)	<p>Ensure high levels of hygiene</p> <p>Have facilities that meet the visitors' needs</p> <p>Show courtesy to guests</p> <p>Be able to establish and uphold high standards of quality</p> <p>Be able to keep promises</p> <p>Welcome guests personally upon arrival at the guesthouse (in the case of the study at the various wine farms)</p> <p>Be able to share positive information freely with the visitors</p> <p>Provide services that meet the visitors' needs</p>
Key success factors for managing a conference centre in South Africa	Kruger (2006)	<p>Have a functional layout</p> <p>Perform marketing management</p> <p>Have operational aspects in place</p> <p>Do proper planning</p> <p>Provide an attractive venue</p>
Critical success factors for wine tourism regions: a demand analysis	Getz & Brown (2006)	<p>Offer core wine products</p> <p>Identify core destination appeal</p> <p>Offer cultural product</p>
Key success factors for managing special events: the case of wedding tourism	De Witt (2006)	<p>Ensure sufficient parking</p> <p>Have special seating for the elderly and children</p> <p>Have facilities for the disabled</p> <p>Have toilets/changing rooms available</p> <p>Have suitable accommodation</p> <p>Place reception area at a reasonable distance from the wine farms</p> <p>Ensure wine farms are capable of meeting the organisers' and visitors' needs</p>

Area of research	Researchers	KSFs
A marketing strategy for the Northern Free State Wine Route	Hoeksema (2008)	Offer events facilities and services Ensure accessibility Identify overall image Identify perceptions of the event Analyse cost to the visitor

Table 1 captures research conducted on key success factors. However, except for Getz & Brown (2006), all the studies concerned the supply aspect. In other words, they examined what the organisers perceive as important. The Getz & Brown (2006) study is slightly misleading since it focuses on key travel motives rather than on key success factors in managing the event. These are two different issues. Therefore, this research focuses on the demand aspect, evaluating what visitors regard as important for managers who host an event of this nature.

## 2. Methodology

### 2.1 Research design and sampling

Exploratory research was carried out using a structured, self-administered questionnaire, which was distributed to visitors during the Robertson Wine Festival in the Robertson Valley. Surveys were conducted using an availability or convenience sample<sup>3</sup> for the duration of the wine festival. In total, 450 self-administered questionnaires were completed over a period of five days (3-7 June 2009) of which 420 were used in the statistical analysis.

3 According to Cooper & Emory (1995: 207), for any population of 100 000 (N) the recommended sample size (S) is 384. Since 16 000 visitor groups attended the Robertson Wine Festival in 2009 (Anon 2009), the number of completed questionnaires is greater than the required number of questionnaires.



## 2.2 Questionnaire

The questionnaire used in this research is based on the findings of Van der Westhuizen (2003), De Witt (2006) and Kruger (2006), and is divided into three sections. Section A includes the demographic profile of the wine visitor; section B includes questions concerning the Robertson Wine Festival and the marketing of the festival, and section C consists of 35 statements by previous researchers concerning important key success factors when managing a festival. Respondents were asked to rate these statements using a 5-point Likert scale where 1 = not at all important and 5 = very important. The questionnaire includes open-ended as well as closed-ended questions.

## 2.3 Survey

To limit any bias towards visitors, fieldworkers were placed at different locations throughout the town of Robertson. The locations also included different wine farms as recommended by the organisers, namely Graham Beck, Bon Courage, Cloverfield and Van Loveren. Fieldworkers were trained to ensure that they understood the aim of the study as well as the questionnaire.

## 2.4 Data analysis

The data was captured using Microsoft Excel<sup>®</sup>, and analysed using SPSS 16.0 (SPSS Inc 2007). A factor analysis was then applied to determine the underlying factors or dimensions in a set of opinion-related questions conducted at the Robertson Wine Festival. The aim was to analyse correlations between pairs of variables and to identify groups of variables in such a manner that variables in the same group are highly correlated with one another but essentially uncorrelated with the variables in another group (Eiselen *et al* 2005: 104-5). Using Promax Rotation with the Kaiser Normalisation to apply a pattern matrix of the principal component factor analysis, seven factors were identified and labelled according to similar characteristics (*cf* Table 2). The seven factors accounted for 64% of the total variance. All

factors had relatively high mean values of between 3.81 (the lowest) and 4.22 (the highest). All items loaded on a factor with loading greater than 0.3. Relatively high factor loadings indicate a reasonably high correlation between the delineated factors and their individual items.

### 3. Results

Table 2 provides the results from the factor analysis of the Robertson Wine Festival. Each of the seven factors is described in terms of the festival.

Table 2: Factor analysis results of the Robertson Wine Festival

Motivation factors and items	Factor loading	Mean value	Cronbach value
Factor 1: Quality and good management		3.81	0.872
Adequate activities for children	533		
Adequate accommodation	948		
Quality accommodation	783		
Affordable accommodation	635		
Public facilities	550		
Affordable prices	579		
Adequate parking at wine farms	600		
Adequate parking in Robertson	622		
Traffic congestion	348		
Factor 2: Wine farm attributes		4.15	0.895
Adequate number of staff	434		
Adequate number of wine farms	576		
Great selection of wines	898		
Adequate wine products	1.057		
Affordable wines	608		
Hygiene	671		
Competitive route	430		
Factor 3: Effective marketing		4.02	0.846
Website	369		

Motivation factors and items	Factor loading	Mean value	Cronbach value
Adequate information	588		
Marketing	848		
Effective booking	765		
Adequate information available	722		
Factor 4: Route development		4.17	0.871
Information available	798		
Well-organised route	850		
Good introduction	665		
Complete route map	601		
Factor 5: Festival attractiveness		4.07	0.843
Family friendly	593		
Enquiries are managed	973		
Value for money	785		
Security measures	511		
Factor 6: Entertainment and activities		4.22	0.623
Variety of entertainment	555		
Adequate variety of activities	708		
Friendly staff	628		
Factor 7: Accessibility		4.13	0.852
Wine farm facilities comfortable	352		
Clear indications	416		
Festival is well managed	574		

Factor scores were calculated by averaging all items contributing to a specific factor, which was interpreted on the original 5-point Likert scale of measurement.

Table 3: Factor correlation matrix

Factor	1	2	3	4	5	6	7
1	1.000	544	559	480	644	376	160
2	544	1.000	567	705	693	412	230
3	559	567	1.000	553	664	458	244
4	480	705	553	1.000	628	444	115
5	644	693	664	628	1.000	462	246
6	376	412	458	444	462	1.000	384
7	160	230	244	115	246	384	1.000

Table 3 shows the factor correlation matrix. The results show a low correlation between the various components, which is an indication that the components are well distinguished and defined.

The key success factors were identified and will now be discussed:

#### Factor 1: Quality and good management

This factor, with a mean value of 3.81, is the least important of the seven factors. Visitors to the wine festival therefore rate aspects such as adequate activities for children, adequate, quality and affordable accommodation, public facilities, affordable prices, adequate parking at wine farms and in Robertson, and traffic congestion as less important. By contrast, it is interesting to note that studies concerning the supply aspect found these issues to be very important (*cf* Getz 1997: 99 & 248, Van der Westhuizen 2003: 183, Hoeksema 2008: 89-90).

#### Factor 2: Wine farm attributes

This factor received the third highest mean value (4.15). This factor includes adequate number of staff and of wine farms, great selection of wine farms, adequate wine products, affordable wine, hygiene, and a competitive route. By contrast, studies concerning the supply aspect found these aspects to be very important (*cf* Van der Westhuizen 2003: 183, Getz 1997: 99 & 248).

### Factor 3: Effective marketing

This factor consists of five aspects, namely the website, adequate information, marketing, effective booking on the website, and adequate information available. The mean value was 4.02 and rated the second lowest of the seven success factors. Mirroring the results of factor one, from a visitor's point of view, marketing was not rated as that important. This contradicts findings by Kruger (2006: 171-2) and De Witt (2006).

### Factor 4: Route development

This factor had the second highest mean value of 4.17, implying that visitors consider this very important. It includes aspects such as information available about the wine route, well-organised wine route, good route introduction, and complete route map available. The results support findings by Kruger (2006: 171-2) that a functional layout map of the event must be provided. The reason for this is most probably that, since the festival takes place over a large area, it would be difficult to find one's way without a proper map.

### Factor 5: Festival attractiveness

Visitors rated this factor as the third lowest with a mean value of 4.07. It includes aspects such as the festival is family friendly, festival enquiries are well managed, the festival offers value for money, and provides adequate security.

### Factor 6: Entertainment and activities

This factor had a mean value of 4.22. Visitors therefore consider that this factor contributes the most to their experience. It includes aspects such as variety of entertainment, adequate variety of activities, and friendly staff. This implies, therefore, that the key to a successful event is what the festival offers from an entertainment point of view. This is the first study to give such a high rating to this aspect.

### Factor 7: Accessibility

This fourth most important factor from a visitor's perspective, with a mean value of 4.13, consists of comfortable wine farm facilities, clear directions to the wine farms, and a well-managed festival.

## 4. Implications

First, the results confirm that the findings of this research concerning the demand aspect are clearly different when compared to similar studies conducted on the supply aspect. This implies that if event organisers continue to do their planning based on what other event organisers rate as important, the visitors' needs may not be fulfilled. This, in turn, could lead to visitors not promoting or returning to the event. This will have an impact on the sustainability of the event. In order to retain current visitors as well as to attract new visitors, the needs of visitors are paramount if event organisers want to offer a quality experience (*cf* Getz & Brown 2006, Van der Westhuizen 2003, Hoeksema 2008). These needs cover the full spectrum of the event, not merely those pertaining to the entertainment programme. Therefore, regular research needs to be conducted in order to understand those aspects that visitors regard as important. To achieve this, event managers can apply a wide range of approaches such as different surveys, focus groups, as well as interactions with various visitors to obtain their opinions on different aspects of the event.

Secondly, this research found that key success factors differ from event to event, or from product to product, thus confirming previous research (Hoeksema 2008, Kruger 2009 & 2006). Managers should consider this. It implies that event management training courses should, in addition to a core curriculum dealing with general event management, provide for event specialisation, such as for instance in the fields of wine tourism or wedding tourism.

Thirdly, the key success factor with the highest mean value was entertainment and activities (4.22). Previous research studies did not identify this as the most important success factor. This implies

that festival organisers, together with wine farm managers, must ensure that sufficient entertainment and activities are arranged during the festival. The results showed that entertainment and activities are not only vital for the management of the event, but also a key motivator for visitors to attend the festival. This aspect requires more attention. In order to determine what the visitors' needs are in terms of activities and entertainment, a need analysis of wine tourists visiting the wine festival should be conducted.

In addition, the festival programme must address the needs of specific target markets, for example, children, students, young people, married couples, older people, wine experts and/or wine lovers. Festival managers could provide special packages for specific groups of tourists visiting the festival. For example, to attract wine experts, a food-wine pairing programme could be offered at different locations. The opportunity to learn about which wines complement different types of food would attract more visitors. Festival managers must also focus on making the festival more child-friendly by having more children's activities, such as a jungle gym, jumping castle, children's competitions, or even face painting offered at the various wine farms.

The participation of wine farm managers is important when arranging entertainment and activities. For example, organising more shows, holding competitions on wine farms with some special wines as prizes, or allowing visitors be part of the wine-making experience by taking them on tours of the wine cellars.

The factors that scored lower mean values are also important key success factors, as areas that do not concern visitors. The lower rating may be because these areas have already been addressed (for example, parking and traffic congestion). Nonetheless, management must still attend to these aspects during the festival.

Finally, the accessibility of the wine festival is evident in three key success factors: marketing, route development and accessibility. This implies that festival management must ensure proper signage to all the wine farms, provide a clear route map and easy access to information via email, website and the information office. If tourists

have enquiries, they must be able to contact or visit the information office during the festival. For the Robertson Wine Festival, visitors can make accommodation bookings on the Robertson Wine website months prior to the start of the festival, or contact the information office for contact numbers of various accommodation facilities. Visitors can also make bookings for activities and entertainment either on the website and/or at the information office. Specialised information about the different types of wines on offer at the various wine farms could also be provided for wine experts and wine lovers.

## 5. Conclusion and recommendations

This article aimed to determine the key success factors (KSFs) for managing a wine festival. Seven of these factors were identified that should help event organisers manage a positive visitor experience. The contribution of this research to the knowledge base of events and tourism literature lies in the following.

First, for the first time KSFs were determined from the demand aspect in South Africa – all previous research had focused on the supply aspect. Secondly, results showed that, although KSF differ from event to event, organisers cannot rely only on information obtained from the supply aspect. The best results are obtained by analysing both the demand and supply aspects and planning accordingly. Thirdly, fulfilling the needs of visitors requires adhering to two criteria: the programme needs and the managerial needs, since such an event covers various aspects, for example accessibility, accommodation, entertainment, transport, marketing, and so on.

Lastly, while the research confirmed some of the previous findings, other findings differed significantly in importance. For example, entertainment and activities, which previous studies did not consider important, received the highest rating in this research. Therefore the research confirms that key success factors differ from festival to festival and between different sectors. Managing these seven factors can contribute to the wine route being more successful, thereby ensuring that the wine festival remains competitive and sustainable in the long term.



In order to market more effectively, it is recommended that the managers of the Robertson Wine Festival conduct a market and needs analysis, in order to determine the different needs of segmented target markets visiting the wine festival. It is also recommended that a comparative study using the same questionnaires be carried out at a wine festival hosted in one location, as it might provide interesting findings.

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