

Buying Wine on Promotion is Trading-up in UK Supermarkets; a Case Study in Wales and Northern Ireland

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Abstract

Purpose

Most wine in the UK is sold in supermarkets and most of this on promotion. This holds down average bottle price squeezing profit margins when wine is sold below-the-line. This paper aims to develop understanding of what currently influences consumers to buy in supermarkets and what might influence them to trade-up.

Design/ methodology/ approach

Literature related to supermarket shopping and to wine buying in an off-trade environment was reviewed. Several issues which may influence wine buying in supermarkets in the UK, particularly the impetus to trade-up, were identified. An exploratory study using focus groups followed to explore these issues in further depth.

Findings

Wine bought along with groceries can be seen to be as ordinary as any other Fast Moving Consumer Good. This perception influences consumers wine buying behaviour in supermarkets. In particular it influences perceptions of suitability and price.

Research limitations / implications

This was an exploratory study with a small sample population and so cannot be taken to be fully representative of the whole UK adult population. Nevertheless it raises many significant issues in relation to wine buying in supermarkets all of which would benefit from further research.

Practical implications

The results highlight areas where all off-licences, particularly supermarket chains, could usefully review their current marketing strategies

Originality/ value

This study highlights the fact there are two wines in many consumers minds. Much wine related research has been undertaken at the high involvement, luxury end of the market, but very little at the low involvement, ordinary end where most sales take place. This paper starts to address this issue.

Keywords

Wine, United Kingdom, Supermarkets, Consumer Behaviour, Grocery Shopping, Trading-up

Paper Type

Research paper

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Introduction

In 2007 the UK light wine market was valued at £11.25bn (Key Note, 2007) and it is estimated to rise to approximately £17bn by 2012 making it one of the most significant markets in the world. Ritchie (2007 and 2009) argues that despite the significance of the UK market there is a lack of qualitative research into the UK wine consumer and their buying habits. Much pre-existing research is built unquestioningly upon the work of early researchers such as Mitchell and Greatorex (1989) and Spawton (1991), for example Arnold (2007), Barber *et al* (2007 and 2008), Casini *et al* (2008), Demossier (2004), Egan and Bell (2002) and Johnson and Bruwer (2004). Mitchell and Greatorex (1989) and Spawton's (1991) studies took place over twenty years ago, however, and, as Ritchie (2009) points out, just as wine was starting to become democratised in the UK via sales in supermarkets. Mitchell and Greatorex and Spawton's work concluded that buying wine involved significant financial and social risk for consumers and therefore that a particular variety of marketing strategies were necessary in order to reduce risk in the purchase decision. Their results were reflective of an adult population just starting to consume a product which previously had significant elitist connotations, (see Bourdieu (1977) for example) including buying from specialist outlets. Of necessity those buying wine in the UK during the 1970s, 1980s and 1990s onwards had very different buying experiences and so specific views in relation to wine usage. This suggests that there is no reason to assume that Mitchell and Greatorex and Spawton's findings are still or all equally relevant to the current UK wine consumer for many of whom wine is now an integral part of lifestyle (Key Note, 2007: Ritchie, 2007: Spawton 2009a) bought alongside groceries.

In fact some of Mitchell and Greatorex (1989) and Spawton's (1991) predictions can now be seen to be incorrect and this therefore prejudices research uncritically based upon their results. For example when Spawton (1991:12) wrote that '*the beverage wine consumers of the 1970's are now the fine wine buyers of the 1990's*', implying that all low involvement consumers could/would trade-up, he had no empirical evidence to back up that statement. The research had not yet been done. Demossier (2004) and Ritchie's (2006 and 2009) work investigating the current generation of UK wine consumers criticises Spawton's findings. Their work suggests that there will always be some wine consumers who are simply not interested in wine *per se*. They are happy to drink it but will never trade-up. In addition Mitchell and Greatorex's (1989) conclusion that brand development would increase and become a significant risk reduction factor for wine has simply not occurred in the UK wine market. AC Nielsen (2005) shows that by 2005 the top five wine brands in the UK had only 34% of the total off-trade[1] market, falling from 37.3% in 1997 (NTC Publications Ltd., 2000). These are tiny percentages in the fast moving consumer goods (FMCG) market when a single FMCG leader usually has between 30% - 60% of the total market. Large UK supermarkets commonly carry a range of 700 to 1000 different wines, (Casini *et al*, 2008: Catchpole, 2009) presented by country and within that by region. The work of Atkinson (1999), Batt and Dean (2000), Keown and Casey (1995), Priilaid (2006) and Seghieri *et al* (2007) suggests that region of origin rather than brand *per se* is the important factor in purchase decisions in the UK.

This is not to suggest that those who rely upon the work Mitchell and Greatorex (1989) and Spawton (1991) are entirely wrong. It does however suggest that like Bourdieu (1997) and

unlike Beverland (2004), Charters (2004), Charters and Pettigrew(2002) and Ritchie (2007 and 2009) much current research has failed to take into account how interaction with wine in the UK has developed since it was introduced into supermarkets in the 1970s. In particular it fails to identify that there are now two distinct wine markets in the UK, everyday and fine/ special; both are important, but they are different. Much research tends to attribute the same wine related behaviours, particularly those derived from interested consumer or student populations, to all consumers and across all purchase situations. Whilst the social and financial risks identified in the original work of Mitchell and Greatorex and Spawton may still attach to significant wine purchases Ritchie (2009) argues that everyday wines are purchased with ease and regularity, almost subconsciously in some cases.

Ritzer (2001) suggests that objects of low cultural value, like inexpensive, everyday wine, are seen as low status and therefore of low academic value. For example Bourdieu's (1977) work completely ignored the table wines drunk daily in most French households, concentrating only on the elitist use of fine wines. Like Johnson and Bruwer (2004) the authors of this paper argue that in wine terms the words cheap / expensive, special/ ordinary may have different meanings to differing social groups related to use in differing social contexts. A £5.00 bottle of wine could be a cheap or a special purchase depending upon who is buying it and for what purpose. Agreeing with Ritzer (2001) the authors of this paper believe that a much clearer understanding of interaction with wine at the low price end of the spectrum is necessary to fully understand UK wine buying behaviour.

The Research Question

Much of the £11.25bn spent on wine in the UK is spent in supermarkets on bottles of wine at £4.00 or less. At this level up to 50% of selling price may be government tax, i.e. goes neither to the supermarket nor the producer. Mintel (2009) shows that the UK wine market had its first volume and value decrease in 2008 following three decades of growth. Primarily this is due to the maturity of the market, the recession and the weakness of the pound. The value decrease, however, is exacerbated by the long-term marketing strategy of discounting wine which supermarkets in the UK have used. This has facilitated the growth of a section of the wine buying public known as Price Promotion Junkies (PPJ) by the trade (Ritchie, 2006); people who only buy wine when it is on promotion. Given the importance of the UK wine market internationally and the financial pressures upon it nationally, there is a need for the wine trade to encourage consumers to trade-up, particularly within supermarkets, if they can.

The aim of this paper, therefore, is to develop our understanding of what influences this present generation of UK wine consumers to buy wine in supermarkets and hence what could influence them to trade-up in a supermarket context. It will review current issues and academic research in this area then via primary data analysis identify issues which consumers themselves consider to be significant influences upon the purchasing decision. Finally this paper will discuss issues which might successfully be further examined by the wine trade to encourage trading-up within UK supermarkets. These results may also help to further understanding of wine buying behaviours in other countries. Since this is an exploratory paper it will also make recommendations for further research.

Literature Review

Background

In 2003 Bunn pointed out that during the previous ten years there had been a 12% drop in the number of off-licences[2] in the UK. The vast majority of those that remain are now owned by multiples such as Oddbins, Threshers and Unwins. Since wine sales continue to increase (AC Nielsen, 2005: NTC Publications, 2000: Mintel 2008 and 2009) it can be assumed that the market growth in wine purchase and consumption has been fuelled by sales within supermarkets (including hypermarkets) (Spawton, 2009a), their proliferation (Mintel, 2008) and the development of internet suppliers, many of whom are owned by the supermarkets, i.e. Tesco. Rickard (2009) shows that this is a normal pattern; when wine becomes available in supermarkets then wine sales in that country / state / region usually increases significantly. This suggests that whilst a reduction in independent wine merchants is not necessarily bad for the UK wine trade *per se* understanding influences to buy in supermarkets is becoming increasingly more important as part of the enhancement of the grocery shopping experience (Esbjerg and Brech-Larsen, 2009).

Current adult per capita consumption of wine in the UK is approximately twenty six litres, having doubled over the last twenty years (AC Nielsen, 2005: NTC Publications, 2000). Unlike much of Europe, consumption is expected to continue to rise once the effects of the recession have passed albeit more slowly than in the past. At the moment off-trade sales represent approximately 80% of the volume and 50% of the value of all wines sales within the UK (Key Note, 2007). Key Note (2007) also shows that the multiple groceries (supermarkets) sell over two-thirds of the value of all of wine bought in the UK off-trade. The average off-trade bottle price is currently just above £4.00, having risen only 4% since 2003 unlike the on-trade where the average bottle price is currently £11 a rise of 12% in the same time period (Key Note, 2007). £4.00 per bottle is considerably lower than the average price for wine sold in other off-trade situations, i.e. independent wine merchants or via the internet or mail order. In addition much supermarket wine is sold on promotion; approximately 60% according to Catchpole (2009). Hamister and Suresh (2008) show that it is not uncommon for many grocery products, including wine, to have both a 'regular' price and a discounted one. Ritchie (2006) points out that wine is sometimes used as a loss leader in supermarkets in the UK.

Casini *et al* (2008), De Kervenoael *et al* (2006) and Mintel (2008) confirm that by developing vast multiple product superstores, there are now only 4 major retail organisations Asda, Sainsbury, Tesco's and Morrisons[3] selling grocery items (food, drink and basic household commodities) in the UK. Anchor and Kourilova (2009), Esbjerg and Bech-Larsen (2009), Hawkes (2008) and Nordfalt (2009) argue that range, quality of product, ease/ efficiency of shopping, (knowing store layout) and price are the key factors for regular supermarket shoppers. They also argue that quality of product equals consistency in a supermarket environment. Consistency of price and product means, for example, that a consumer can take as little as 13 seconds to choose their preferred soap powder (Nordfalt, 2009) and has little need nor intent to look at other products in that category. Curiously Charters (2009) argues that wine brands do not have to maintain consistency (within parameters) as long as quality is maintained. In the UK this view may support Atkinson (1999) and Keown and Casey's (1995) work which showed that consumers often mentioned regional names such as Chianti and Rioja as brands when discussing repeat buying their favourite wine. If consumers are using regions as brands then some variation would be expected. Indeed Vinexpo's (2003) findings suggest that most UK consumers choose not to be brand loyal and don't purchase well-known brands when overtly

buying wine.

This then identifies a major paradox for wine sales in supermarkets. Whilst brands may provide the consistency and reassurance that low involvement and novice consumers are said to want (Barber *et al*, 2008; Johnson and Bruwer, 2004) for many FMCGs, i.e. Heinz baked beans, Coca Cola, this may not be applicable in wine terms (Charters 2009; Vinexpo, 2003). Indeed high involvement or consumers seeking a high involvement purchase may well choose to buy away from a branded product and outlet (Ritchie, 2009). This means that trading-up commonly takes place outside the supermarket environment in a specialist environment and is reflected in the higher average bottle prices in specialist off-licences.

Ability to Buy Wine in UK Supermarkets

The ability to buy wine or any other type of alcohol is not the same throughout the UK. In England and Wales the 2003 Licensing Act determines selling hours. In Northern Ireland the sale of alcohol is governed by the Licensing (N.I.) Order 1996. Whilst the 2003 Licensing Act is often referred to in the UK press as the 24 hours drinking law, it does not actually necessarily permit consumers to buy and or consume alcohol twenty four hours a day seven days a week. Any premises wanting to sell alcohol will apply to the local Licensing Authority for permission to do so; included in that application will be a description of their proposed opening hours and where precisely on the premises the alcohol will be sold (and consumed if appropriate). In practise all off-trade premises in England and Wales apply to be able to sell alcohol throughout their normal opening hours; these reflect their perceived business needs. Most supermarkets in England and Wales also reserve the right to place and promote alcohol throughout their premises. This then enables the supermarkets to promote alcohol, usually wine and beer, throughout the outlet, up-sell gondola ends and take advantage of the impulse or association (cross-merchandising) purchasing that Hawkes (2008) Nordfalt (2009) and Spawton (2009a) discuss.

In Northern Ireland, by contrast, wine sales are restricted to designated aisles that are physically separated by a barrier and which only those over the age of eighteen may enter. Eighteen is the legal minimum age for buying alcohol throughout the UK. Wine sales have to be made through designated check outs whose operatives are over eighteen. In addition alcohol related promotions are not permitted throughout the store, only in the designated alcohol aisles. Larson *et al* (2005) showed that consumers do not usually trawl through each aisle when shopping in supermarkets instead they utilise the 'racetrack', outer perimeter aisle, to get to whichever aisle they intend to shop in as quickly as possible. The inability to promote wine throughout the store and the need to be over eighteen to go through designated turnstiles may impact upon wine buying behaviour. Since these differences are reflective of different selling patterns within other countries (Rickard, 2009) where wines sales continue to rise their impact in the UK is still to be confirmed.

Buying Behaviour

Beardsworth and Keil, (2000), Demossier (2004) and Ritchie (2006) point out that in many households, particularly low income ones, meat is often considered to be the most important part of a meal; it is the meal component with the greatest symbolic value. Therefore there is a belief that wine should not cost more than meat does. Although not all wine is bought to go with a meal

much is. Where wine is for home, private, consumption it may be that this cultural norm has an unconscious impact on acceptable bottle price. This belief may help to explain the UKs' reluctance to move from £3.79 to over £4.00 per bottle, particularly when grocery shopping, even if colour, origin or brand are overtly stated to be significant influencers as well as price.

As previously discussed, De Kervenoael *et al* (2006) and Mintel (2008) show that consumers no longer have a wide choice of grocery retailers and therefore are driven primarily by location and convenience. If the supermarket brand/ chain is trusted and competitive then its products can be bought regularly with speed and without effort for home consumption; trust grows with regular positive shopping experiences (Anchor and Kourilova, 2009). Cockburn-Wootton (2002) shows that since women in partnerships in the UK still undertake most of the routine grocery shopping in their household they perceive it as mandatory and functional, as opposed to the leisure activity it may be seen as by many men in partnerships. The risk for wine purchasing is that if wine is bought with this mind set then potentially it may also become perceived as ordinary, functional and grocery for regular shoppers (Alexander *et al*, 2009: Ritchie, 2009). In addition since consumers anticipate that they will be able to buy the same popular FMCGs in every supermarket at a similar price point (Anchor and Kourilova, 2009: Ellickson and Misra, 2008: Hamister and Suresh, 2008) this may reinforce the image of ordinariness for some nationally available wines brands and for supermarket own brands. This might explain the Vinexpo Studies (2003) results which suggested that most consumers do not buy well known brands when actively seeking to buy wine. Therefore whilst the development of wine buying as part of everyday grocery shopping can be seen as positive for the wine trade, the habit of perceiving a particular type of wine buying as routine, ordinary and impersonal (Esbjerg and Bech-Larsen, 2009) may be negative.

Reflecting Nordfalt's (2009) findings that regular shoppers value an efficient, known shopping experience in their preferred supermarket Ritchie (2009) identified the phenomenon of 'not' buying wine. In this phenomenon the purchase of wine is so integral to a routine grocery shop that the consumers did not register the purchase. This was a gender based behaviour. In a series of focus groups many female participants denied buying wine at all, even though demographic data collected from each participant at the start of each focus group indicated that they did, and usually from supermarkets. When questioned about this they simply said that you don't 'buy' wine as part of the main grocery shop. You might place bottles in the trolley and pay for them but these were insignificant purchases; wine buying is an activity which requires thought, effort and is probably for a special event. Furthermore to show that effort had been made branded or supermarket own label wines (unless it was Waitrose[4]) would not usually be socially or culturally acceptable. Many women in Ritchie's (2009) study went so far as to suggest that 'wine buying' (although not wine drinking) is a male activity. Differences in gender based buying habits have also been identified by Hoffman (2004), Quester and Smart (1996) and Mitchell and Hall, (2004) who showed that whilst women buy more wine *per se* than men, especially from supermarkets; men are much more likely to spend more per purchase in other locations.

To add complexity to the argument about how people perceive the supermarket shop, both Larson *et al* (2005) and Ritchie (2006) were able to show in their work that there are those whose time is very limited, the bustling shopper, and those who spend much more time in the shop, the

browsing shopper. Length of time spent in the shop or regularity of shopping trips does not necessarily increase the number of purchases (Min, 2006) although it may influence unplanned purchases (Nordfalt, 2009). Other differences in buying habits have been identified by other authors. George (2005) and Min (2006) both discuss age related behaviours with regard to grocery shopping *per se* and Ritchie (2009) with regard to wine buying. For example all show that young adult consumers have the lowest confident levels, probably attributable to the fact that they have only recently started to undertake routine household shopping for themselves. It is likely that they are still acquiring the skills for this type of shopping experience. Therefore speedy checkout and user friendly lay-out are important attributes for this group. At the other end of the age banding, many of those over 50 consider price to be the most influential reason to use a particular supermarket. Vinexpo (2003) and Wilson and Wood (2004) highlight the impact of children upon parental shopping. They show that most mothers in particular believe that they can shop more efficiently, quickly, when they are not accompanied by their children. Children are not allowed in the wine aisles in Northern Ireland.

Geiger (2007) and Nordfalt (2009), however, both identify new kinds of supermarket consumers those who do not make the planned weekly and supplementary household shops. Nordfalt (2009) suggests that some adults, especially those with a single lifestyle may be using supermarkets as a 'pantry'. Rather than stocking food at home they drop into a supermarket whenever they need to buy food and thus are potentially very susceptible to impulse buys, i.e. the ready meal and wine to go with it. Convenience, not price is the driver. Geiger (2007) argues that it is the recent advent of 24 hour shopping within the UK which has encouraged the development of these new grocery shopping behaviours. In particular she argues that more affluent single people, shopping at less busy times of the day, often at night, are extremely sociable and open to having conversations with both staff and other customers. These may be the consumers that Esbjerg and Bech-Larsen (2009) identify as having the potential to be particularly influenced by experiential aspects of supermarket shopping. In contrast, however, Sands *et al* (2009) argue that specialist outlets may be more suitable environments for experiential shopping experiences *per se* than large impersonal superstores.

Promotional strategies

Whilst most point of sale promotional sales activity involves price promotions, whether perceived or actual, Lockshin (2004), Orth and Krska (2001) and Parsons and Thompson (2009) show that the promotion of medals won in completions, particularly gold medals, will stimulate sales. Parsons and Thompson (2009) show that this effect is particularly noticeable in supermarket purchase situations. Another commonly acknowledged 'shelf talker' is recommendations from wine gurus (Ali *et al*, 2008). These can be either acknowledged wine experts such as Robert Parker or Jancis Robinson, or they can be recommendations from writers in newspapers such as Matthew Jukes in The Guardian. Horverak (2009) points out that consumers are most likely to believe the material if they have learnt from previous experience that their opinions usually concur with those of the guru.

Whilst there is some national marketing of wine in the UK, i.e. Jacobs Creek sponsoring the TV programme Friends, only the bigger companies or generic wine boards such as the Australian Wine Bureau (sponsor of the Mitsubishi Motors Badminton Horse Trials, 2004) have the budgets to sustain major campaigns. In addition research by Atkin *et al* (2007) and Parsons and

Thompson (2009) suggests that point of sale promotions are the ones most commonly recalled by consumers and the most likely to stimulate impulse purchases. Most wine related promotional activity in the UK, therefore, takes place on in-store activities. In supermarkets this includes utilising the end of aisle gondolas to increase sales of particular items; end of aisle gondolas are on the 'racetrack' therefore items are frequently seen and easily trolleyed[5] (Hawkes, 2008; Larson *et al*, 2005). These are favoured, expensive spaces and so can only be purchased by large companies with large marketing budgets. In relation to wine sales, whilst they can be used for shelf-talker promotions they are more normally used for price promotions.

There are three main types of price promotion, three for £10, price reductions and Buy One Get One Free (BOGOF). As Ritchie (2006) shows three or two for £10.00 promotions may not actually mean a price reduction; however it is a simple quick purchase especially for bustling or low confidence consumers. The choice has been made by the supermarket and if the consumer trusts the supermarket they trust the offer. The consumer may or may not believe that a price reduction is involved. Both of the other price promotion activities involve price reductions, which if they occur too often may well damage the image of the brand (Ritchie, 2006) and reduce its value.

Casini *et al* (2008), Ellickson and Misra (2008), Hamister and Suresh (2008) and Parsons and Thompson (2009) discuss both types of price reduction promotions; price discounting and BOGOFs. Hamister and Suresh (2008) also commented on a policy used in beer discounting which is unlike other grocery goods. They discussed price 'cycling' where the product would be on sale at one price for a while and then heavily discounted for a period then it would return to the 'normal' non-discounted price and the cycle would start again. This is a practice that is also commonly applied to wine sales in the UK and is a common form of price promotion. Casini *et al* (2008), De Kervenoal *et al* (2006), Ellickson and Misra (2008) and Parsons and Thompson (2009) all agree that this kind of price promotion is very popular with more affluent, mobile consumers; those with cars and who can buy in bulk. AC Nielsen (2005) reinforces this point by showing that most wine is bought by more affluent consumers. Therefore affluent consumers who are brand loyal tend to stock up on their favourite brand when it is on promotion and then not buy again until it comes back onto promotion in that or another alternate supermarket. This suggests that little financial benefit is directly obtained by the supermarket organisation for these types of promotions. Since consistency and competitiveness are key to trust in the routine grocery shop the more affluent, mobile consumer simply stockpiles or switches another outlet to take advantage of price discounts. Supporting this view, Casini *et al* (2008) and Ritchie (2006) show that many habitual wine consumers believe that for those wine brands whose prices are cycled regularly the real price is the discounted one. If they have a preferred brand they would rarely buy at the non-discounted price perceiving the 'normal' price to be a marketing ploy. These are the actions of confident, but not necessarily highly involved, wine consumers.

In contrast to price promotions, AC Nielsen (2005) shows that most wine bought via BOGOF promotions is bought by less affluent consumers. Perhaps as a result of this Casini *et al* (2008) and Ellickson and Misra (2008) suggest that BOGOFs are seen as 'cheap' and therefore not acceptable purchases for more affluent consumers particularly for public consumption situations. This suggests that, like any other grocery product, wine which is constantly sold as an Every Day Low Price (EDLP) item will have the same perception in wine consumer's minds; that it is

cheap. This includes those own brands promoted as EDLP products. Casini *et al* (2008) and Ritchie (2009) suggest that this could prevent such wines being used for public consumption because of the fear of the purchaser / giver as being perceived as cheap themselves. This may act as a significant hindrance to consumers trading-up and or from buying special wines in supermarkets at all unless the wine is not identifiable as a supermarket style brand.

Wine Tasting as an Influence to Purchase

Batt and Dean (2000), Esbjerg and Bech-Larsen (2009), Gluckman (1990), Johnson and Bruwer (2004), Priilaid (2006) and Ritchie (2006) all agree that wine tasting *per se*, particularly in conjunction with knowledgeable staff, is a positive influence to try new wine and / or to trade-up because the consumer is reassured that they like the wine before they buy it. In-store tasting is one of the few promotional activities where an immediate correlation between the promotion activity and purchase can be identified. In the UK many specialist chains and independent stores hold wine tastings on a regular or even permanent basis (i.e. Majestic) intending, as Sands *et al* (2009) discuss, to enhance the shopping experience and therefore up-sell their product. The ability to taste prior to purchase is of particular importance when the purchase is more expensive or more significant than usual. However Gluckman (1990) and Ritchie (2009) also suggest that wine tastings are most effective when the setting is most naturalistic. There is the potential for discordance if the wine, drunk in different environment, does not taste as expected. The consumer will be disappointed and trust with that outlet and their staff may be broken. Both Gluckman (1990) and Ho and Gallagher (2005) found that wine tastings were most likely to be effective, influence purchase, in larger group tastings; over three people. This may be because it simulates a social gathering in which wine might be consumed. This all suggests that the physical setting of a wine tasting is likely to influence potential to purchase, trade-up. In England and Wales alcohol tastings can take place in any public space in most supermarkets, perhaps alongside related food promotions. In Northern Ireland they may only take place in the designated alcohol aisle/s.

One fundamental difference between wine tastings in specialist wine merchant and supermarkets in the UK is that ISO[6] tasting glasses are usually used in wine merchants whilst small disposable plastic (usually 25ml) taster cups are the norm in supermarket tastings. Whilst wine merchants usually have a supply of tasting glasses as part of their normal 'shop-fittings' and the facilities to wash the glasses after use, supermarkets do not hence their use of disposable plastic. However wine is not normally consumed in small plastic cups. The authors suggest that the drinking vessels used in supermarket wine tastings may affect perceptions of the wine tasted, since wine sold plastic bottles in the UK is seen as cheap, basic, bulk wine.

As Ritchie (2006) points out there may be other barriers to effective wine tasting in supermarkets. The first issue may arise simply because the outlet may have had little say about what wine is being promoted during a tasting as it is part of a national/ international chain. Its particular customer profile may suggest that a particular wine is unlikely to be attractive to its consumers but the promotion is national. Another barrier, highlighted by Parsons and Thompson (2009) as well as Ritchie (2006) is the perceived ignorance of the staff running the promotion. They may be seen just as bodies to pour the samples; the same person may have promoted sausages the previous week and do chocolate biscuits the next. If the wine served is not in good condition, too tannic, sweet, warm etc and the comments made by the member of staff ill-

informed this will also impact unfavourably. Barber *et al* (2008), Dodd *et al* (2005), Hoffman (2004), and Johnson and Bastian (2007) agree that interaction with staff will impact upon the buying decision especially when involvement is low. Geiger (2007) and Parsons and Thompson (2009) also point out that adult consumers may have driven to the supermarket intending to do a large shop, they may have their children with them and or they may be under time pressures. Some, therefore, are unlikely to ever perceive wine tasting to be a suitable activity during a grocery shop although, as Sands *et al's* (2009) work suggests, it could be in a specialist wine shop where they would expect to be overtly participating in wine related purchasing activities.

Geiger (2007) and Nordfalt's (2009) research, however, suggests that there are other newly identified groups of consumers, the pantry/ impulse buyer and the night time shopper, who might well enjoy the experience of wine tasting in supermarkets during their shop. For the pantry shopper this may be because they are actually looking for wine to go with their evening meal; for the night time shopper because of the nature of the increased sociability of their shop.

Method

Qualitative methods were chosen for this study for two reasons. Firstly, because as Baumberg (2009) demonstrates, quantitative data is readily available for the UK population via the government run Office for National Statistics as well as market research companies such as and Key Note Ltd and Mintel. In addition Customs and Excise and the National Health Service produce large amounts of statistical data relating to alcohol purchase and consumption. Indeed Spawton (2009b) points out that most supermarkets themselves hold a great deal of quantitative data on their consumers gathered via check out data. Quantitative data, whilst very useful in itself, does not, however, provide the in-depth understanding and insights into cultural norms which influence consumer behaviour that qualitative research is able to (Barbour and Schostak 2005) and that authors like Bruwer *et al* (2005) suggest are needed in this area. This was the second reason for choosing a qualitative research method.

Meiselman (2006) points out that whilst much research is done in a laboratory under laboratory conditions (e.g. Parsons and Thompson, 2009) results obtained in this way usually differ from results obtained under more natural settings. The issue of naturalistic settings was also raised in the literature review (Gluckman, 1990: Ho and Gallagher, 2005: Ritchie, 2009). One of the critical features of this study was to take it out of a laboratory environment. The other was to discuss wine with wine consumers in the most natural environment that could be achieved, i.e. in a relaxed social group (Ritchie, 2006). Therefore it was decided to collect primary data via focus groups. A link person was identified, that is to say a person known to one of the authors and a standard snowballing technique (d'Cruz and Jones, 2004). This person then invited a group of adult friends and or peers to participate in a six / eight person focus group. The only prerequisite was that the participants must drink wine and that a gender balance should be maintained. As this was an exploratory study age was not taken into account. It was decided that the focus groups would take place at a time of the link persons' choice, in their home and with all of the participants sitting round a table. This ensured that the discussion took place in a setting which is natural for both wine discussion and consumption and, therefore, is recommended good practise for focus groups (Putchá and Potter, 2004). A wine tasting was incorporated to stimulate discussion, to test the impact of drinking vessels upon the focus group participants and as a reward for their attendance.

This study was conducted in two major cities within the UK during 2009, Cardiff (Wales) and Belfast (Northern Ireland). This was done both for pragmatic reasons, ease of access by the authors, and also because both cities have large and varied adult populations ranging from those who work in manufacturing, the arts and government to large university populations. As Ritchie *et al* (2009) show, alcohol related studies which rely heavily upon student populations cannot be taken to be representative of the adult population as a whole. Therefore cities in which a full cross representation of the UK adult population could be found were considered to be essential for this study. In addition, the literature suggests that the two main price promotions used by supermarkets are attractive to two different socio-demographic groups, price reductions to the more affluent and BOGOF's to the less affluent. The authors, therefore, wanted to base their research in populations where both of these groups could be found. The authors also wanted to investigate whether or not the differing legal restrictions related to wines sales in the regions of (England and) Wales and Northern Ireland impacted upon the purchase of wine.

As previously mentioned, it was decided to incorporate a small wine tasting to thank participants, to try to establish whether the use of tasting cups as opposed to glasses had any impact upon perceptions of the wine tasted and to stimulate discussion about wine tasting in off-licences *per se*. For the wine tasting the participants were given what they thought were eight wines to taste blind. They were told that they were going to be asked to identify which of the samples were wines likely to be found in supermarkets and which they would expect to find in specialist off-licences. In fact they had been given four wines, two red and two white, but one sample was poured into an ISO glass and one into a plastic tasting cup similar to those used by supermarkets. The participants were told that they did not actually have to drink the wine, they need only taste; spittoons and water were provided. A tasting sample in an ISO glass is usually approximately 50 ml and in a plastic tasting cup 20 ml. Because of the small sizes of the samples had the participants decided to drink all of each of their samples they would still have been within the UK government recommended daily drinking limits two to three units [7] per day for women and three to four for men. To ensure the most exact comparison possible the wine used was bought from the same supermarket chain, one red and one white, and the same chain of specialist off-licences, the other red and white, within the same week. The prices paid were the average ones for those environments.

Two criticisms can be raised about this study. One that if the authors are seeking naturalistic settings why not interview consumers *in situ* in supermarkets? Agreeing with Barbour and Schostak (2005) the authors did not feel that this would be appropriate for many reasons including those raised in the literature review. For example, many consumers would be under time or child pressure, many consumers with low confidence might not want to participate in such a public arena whilst having a chat with friend in their home is not such a daunting experience. There was also potential for the sample to be biased towards particular groups especially in Northern Ireland where the space to hold a tasting is very limited. For all of these reasons it was decided that wine tasting in a home environment would be more practical and the home environment would facilitate greater in-depth discussion. Whilst the focus group situation is not the natural setting for wine buying in supermarkets it does replicate many of the features of a normal wine consumption situation.

The second potential criticism is related to the use of snowballing techniques to identify a link person. As Kelley *et al* (2003) point out one feature of this type of sample recruitment is that not only may the researcher and link person belong to the same socio-demographic group, but so may those (friends and peers) recruited to the focus group/s. Since the authors of this paper can be classified into the classic higher education and income profile identified in much research into wine related consumer behaviour (Barber *et al*, 2006: Batt and Dean, 2000: Bruwer *et al*, 2005: Johnson and Bastion, 2007: Ritchie, 2009) this was not felt to be a significant issue at this stage of the research. Any bias identified will be corrected for in future research where, for example, representation of those consumers more likely to be involved in EDPL buying and BOGOF promotions would be actively sought.

One unexpected and interesting result was obtained because focus groups were used. During the discussion after the wine tasting participants were able to handle the wine bottles used and encouraged to develop the comments they had made during the blind tasting. After a while one of the interviewees started putting them down in different orders and then announced that she had just realised that she really disliked one particular bottle shape. She said that this made her wonder if she was far more influenced by bottle shape than by labels. This also happened in Ritchie's (2006) research. The implications of these observations are not discussed in this paper since they fall outside its remit; however they reinforce Meiselman's (2006) view that even small study research undertaken outside a laboratory may produce results not otherwise obtainable.

Two focus groups, one in Belfast and one in Cardiff, were undertaken because the authors were aware that differing licensing legislation might impact upon buying habits. This is an exploratory paper, therefore, based on two focus groups of wine consuming adults of equal gender balance with an above average socio-demographic profile. Whilst an exploratory study cannot be taken to be representative of the adult population of the UK, or any other population (see Bruwer *et al*, 2005), results from such work can, and does raise many issues which are of interest in themselves. The authors intend to fully explore these areas in their future research.

Results and Discussion

As a regular visitor to England one Northern Irish participant commented on the differences in store layout between Northern Ireland and England (and Wales); another Northern Irish participant commented that she had to go through the tills twice in her local supermarket because the liquor aisles were completely separate from the rest of the store. As Rickard (2009) had suggested, however, inconvenience did not stop wine buying. Other than these two comments, differences in store/ wine aisle layout seemed to make no overt difference to wine buying.

The order of the shopping process was much more significant. Reflecting Esbjerg and Bech-Larsen (2009), Larson *et al* (2005), and Rickard's (2009) work this confirms that supermarket shoppers have set patterns and preferred routes which they use for regular shops to ease and speed up the process. Furthermore, all of the participants said that they always bought their wine after they had completed their food shop because '*you know what food you've bought and then you look for your wine*'. Supporting Beardsworth and Keil, (2000), Demossier (2004) and Ritchie's (2006) findings this suggests that food, meat, still retains its symbolic importance and impacts upon the wine finally purchased. In fact the association with food shopping was so

strong that one female participant said that when she only wanted to buy wine she would go to the local off-licence in preference to the supermarket because of the food shopping / grocery shopping association.

However, a paradox can be identified here. As discussed in the literature review wine can be promoted throughout the store in England and Wales. When the participants in the Welsh group were asked about where in a supermarket wine could / should be sold, some began to talk about promotional displays at the front of the shop. Male respondents suggested that there was some clever marketing going on, putting '*seasonal stuff*' immediately in front of you. As Hawkes (2008) discusses this is precisely what the supermarkets are doing, stimulating impulse buys. Female participants, however, described trolleying this wine because '*it's there in the front and it's reduced*'. Furthermore they said that '*you haven't stopped to think how much you're spending and you go straight in and buy it straight away*'. This contradicts Mitchell and Greatorex (1989) and Spawton (1991) but does support Hawkes (2008), Larson *et al* (2005) and Ritchie (2006; 2009); there is no risk in this type of wine purchase because there is little thought to it. It also contradicts what the female participants said they did when buying wine; that they bought the food first and then the wine. This suggests that when asked to recall wine buying activity *per se* people may describe culturally acceptable normative behaviour, buying food and then wine to go with it, rather than actual behaviour. As with Ritchie's (2009) study the participants, women, describing these behaviours didn't seem to notice any contradiction between their comments and their actual behaviours.

There was agreement that in partnerships men did most of the wine buying; some women saying that they only bought wine if they were accompanied by their husbands. Quantitative data, Mintel reports for example, show that more women buy wine than men in the UK in supermarkets; that is to say pay for it at supermarket checkouts. Qualitative research results, however, are more mixed and dependant upon place of purchase, Bruwer *et al* (2005) and Ritchie (2009) for example. All of these results suggest that there is a need for both academia and the wine trade to develop a better understanding of the meaning of the phrase 'buying wine' as it is used by consumers in differing contexts.

Most female participants suggested that if you do get to the wine aisles then you probably do look at the wines because you had wine on your list (mental or physical) of things to buy. Several male participants in both focus groups said that they usually browsed in the wine aisles. When asked what then prompted the actual purchase in this overt buying mode, there were only two responses; price if the wine was for themselves and the recipient or others present (plus price) if the wine was a gift or for public consumption, i.e. a dinner party. There was no gender difference in this response. Reflecting Casini *et al* (2008) and Ellickson and Misra (2008) comments were made about acceptable and non-acceptable price promotions but there was no mention of seeking specific wine brands, BOGOF's or EDLP wines. Price reductions and two/three for £10/£12 offers were the promotions discussed. This result from this socio-demographic group had been anticipated in the literature. Confirming Casini *et al* (2008) and Ritchie's (2006) findings several participants also said that they were '*wary*' of the reality of the offer in those wines that were frequently on offer, but where they saw a particularly good discount (25%) it would tempt them to buy. There was also a belief that the two/ three for £x offers were actually price discounts as well as the price reduction promotions.

Gendered differences in attitude towards wine and wine buying habits have been frequently identified (i.e. Hoffman, 2004: Mitchell and Hall, 2004: Quester and Smart, 1996). This behaviour, not stopping to think and not being aware of actual price paid just that the point of sales material said the price was reduced is new. It does, however, agree with Alexander *et al* (2009), Anchor and Kourilova (2009), Larson *et al* (2005), Nordfalt (2009) and Ritchie's (2009) findings. Because of competitive pricing policies trust in the outlet enables regular supermarket shoppers to focus very precisely on routine functional purchases without considering the actual price paid for each item. This includes wine for private, home, consumption. If there is always a wine promotion of any sort on the consumers preferred path round the supermarket and wine bought from that display has met the consumers' needs in the past, then during the habitual routine planned supermarket shop the consumer will buy from that display area again. It is not so much an impulse buy as a rationale planned behaviour which ensures that another item is efficiently ticked off the shopping list. Since there is a charge for preferred display shelving then only the larger brands will be able to afford to have their products displayed here. It is also only the large brands owners who can afford to use the cyclical price promotions that Hamister and Suresh (2008) described. This use of preferred display shelving may explain the popularity of some brands of wine. In this study, however, even when one wine tasted was revealed to be one of the top selling wine brands in the UK, Blossom Hill, no discussion about wine brands evolved: no comment about a favoured brand, brand names or anything else. It is a mute point, therefore, as to whether the consumer is always deliberately buying a particular wine brand or simply buying at a favoured point of purchase; Vinexpo's (2003) findings and Ritchie's (2009) identification of not-buying lends support to the latter concept in many instances.

One other attribute of wine bought on promotion was also mentioned. Where there was a good price reduction it was worth buying the wine and taking it home '*because that's where you're going to learn*'. This supports Ritchie's (2009) view that the home, or other private consumption situation, is a safe place to try a wine out because it removes that danger, stress, of making a mistake, choosing a 'wrong' wine, in a public consumption situation. It also confirms the current relevance of some of Mitchell and Greatorex (1989) and Spawton's (1991) findings to particular, public, consumption situations. Interestingly and unexpectedly this activity was also mentioned in relation to in-store wine tasting. The participants said that if they tasted a wine in a supermarket environment they might be tempted to trade-up, but only to buy a couple of bottles because they would need to take it home and try it in the home environment to make sure that they also liked the wine in that situation. This suggests that many consumers are aware that the in-store supermarket tasting situation does not replicate normal wine consumption situations; particularly as most are currently run. Whilst many authors (Gluckman, 1990: Ho and Gallagher, 2005: Johnson and Bruwer, 2004: Ritchie, 2006: Spawton, 2009a) have talked about the value of wine tasting to encourage experimentation and trading-up, this point about needing to retest the wine in another environment before being convinced of its suitability has not been identified previously.

Analysis of responses during the blind tasting showed that most participants thought that they were actually trying eight different wines. Only one, male, participant queried the number of wines really being tasted. Since all the participants were regular wine drinkers the authors had anticipated a higher number of queries, particularly for the Blossom Hill. In only one instance

was the wine in a plastic tasting cup preferred to the same wine in a glass. This suggests that the drinking vessel was impacting upon the participants' perception of the wine they tasted. During discussion re the use of the plastic tasting cups used in supermarkets the participants also commented upon the use of morning tastings. As the literature had suggested morning tastings were generally felt to be inappropriate.

Agreeing with Parsons and Thompson (2009) and Ritchie (2006) the focus group participants said that their perception of the salesperson was also vital to their belief in the value of their recommendations for wine. Where they saw the person doing the tasting as lacking knowledge they would not listen to their recommendations. As Parsons and Thompson (2009) also found, supermarkets staff were not seen as specialist unlike those who worked in off-licences therefore when help was needed for special purchases this was another reason to go to a specialist off-licence. The participants raised one further point, the sales person had to be old enough to be seen to be credible; one participant commenting that '*they wouldn't trust a youngster*'. This point is discussed by Ritchie (2006) but is not often mentioned in research relating to staff credibility in the wine trade. It does, however, reflect the recruitment policy of several major DIY[8] chains in the UK. When recruiting floor staff mature applicants are often preferred because it is believed that their maturity will be perceived by customers as evidence of experience, credibility and knowledge. As Sands *et al* (2009) point out, the human component is a significant part of the rationale for choosing a particular outlet. These results suggest that tasting vessel and physical environment, servicescape, impacts upon the impulse to taste and the tasting vessel and staff credibility upon impulse to trade-up.

The final point discussed was the relationship between buying on promotion and buying wine as a gift. Much previous research has established that when buying wine as a gift consumers usually trade-up, the amount being dependant upon the recipient and significance of the occasion. However in this research a further dimension was added. Where the recipient did not know much about wine or when it was a '*Christmas type*' gift the wine gift could be bought in a supermarket. Participants, particularly those who described themselves as having little knowledge about wine, discussed buying 'expensive' wine at a significant price discount and storing it away until they needed a wine gift. In this situation a shelf price of up to £15 or £16 with a discount of 25% was seen as a good gift by some, but, reflecting Johnson and Bruwer's (2004) findings, for others two for £10 would also meet this criteria. Where the wine was to be given to a person knowledgeable about wine or the reason for the gift was significant, there was general agreement that the wine should be bought in a specialist off-licence because of the knowledge of the staff and with that person and or occasion in mind. The notion of the '*Christmas type*' wine gift was also identified by Ritchie (2006). Although not explored in detail in this study, in Ritchie's (2006) study this situation was described as being when you feel obliged to give a gift to someone that you don't know very well, the gifting situation is going to be fairly public and the gift has to reflect well upon the giver; in Ritchie's (2006) study described as '*a Christmas present for a potential in-law*'.

Two points are raised by this. One that, as the authors originally suggested, what is expensive to one consumer is not necessarily expensive to another, but that both sets of consumers like to believe that they have bought a bargain in a supermarket environment. Secondly that not only may more affluent and mobile consumers be bulk buying in their normal wine at discounted

prices (Casini *et al*, 2008: De Kervenoal *et al*, 2006: Ellickson and Misra, 2008: Parsons and Thompson, 2009) but they may also stockpile suitable discounted wines for less significant future gifts.

Conclusions and Recommendations for Further Study.

The results of this study suggest that buying wine on promotion is trading-up in supermarkets in the eyes of many consumers. Supermarkets are places where ordinary shopping is done and obtaining a bargain / coming in on or under budget is an intrinsic part of the grocery shopping experience. Deliberately buying wine outside this construct goes against the concept of regular supermarket shopping. This perception combined with the continuous prevalence of discounting wine in UK supermarkets has created price promotion junkies throughout the adult population. After so many years of using wine as a loss leader to entice consumers onto the premises the expectation of a bargain may be the main barrier to encouraging consumers to trade-up when buying wine in supermarkets in the UK.

This study confirms that in the UK most wine is bought in supermarkets and most shopping in supermarkets is done by women. In addition, particularly for women in partnerships and probably with children living at home, the regular, planned grocery shop is at its most attractive when it becomes efficient, automatic and quick. This suggests that encouraging real trading-up amongst this particular population may be not be possible unless it is done via favoured sites on preferred shopping routes.

This study, however, also suggests that there may be other populations and other modes of buying during which particular wine consumers could be persuaded to trade-up. For example, Geiger (2007) and Nordfalt's (2009) work suggests that as lifestyles are evolving so may some consumers' perceptions of shopping in supermarkets. Geiger (2007) and Nordfalt's (2009) late night and single lifestyle shoppers may well be able to be influenced to trade-up particularly via traditional (glass not plastic) in-store tastings run by staff perceived as knowledgeable and sociable. Since they shop primarily in the evenings in browsing mode they are much more likely than bustling daytime shoppers to be thinking about drinking wine and interested in a more experiential shopping experience (Esbjerg and Bech-Larsen, 2009). Discussion with credible, knowledgeable staff and tasting before buying is likely to make sense to this group of shoppers encouraging experimentation and real trading-up.

A behaviour identified in this study where wine consumers habitually pay more money than is their norm was that of stockpiling wine as gifts for as yet unspecified occasions. This buying is currently done when the wine is seen to be on a good promotion; although above normal spending price the wine is to be a gift which justifies the higher price. This suggests that where a wine gift has a ritualistic, reciprocal, impersonal meaning then it can be bought in a supermarket by a range of consumers. The development of marketing strategies aimed at what is currently an impulse purchase during which wine buyers are predisposed to consider spending above normal prices might be effective in increasing actual spend. Added value, to justify trading-up, may have to be developed though cultural capital rather than price promotion since the wine buyer would still need to believe that they had bought a socially acceptable gift. As Demossier (2004) and Ritchie (2009) discuss you don't actually have to like wine much to understand and participate in its use via gifting and reciprocation as a tool for social identification and bonding.

This study also identified one area in which the shopping experience was, of necessity, different. In Northern Ireland alcohol cannot be displayed at key points on preferred routes, i.e. at the front of the shop, however it can and is in England and Wales. As a result only those in the Welsh group talked about not thinking about the wine they were putting in their trolley. Comparative exploration of different attitudes and buying behaviours because of the ability or not to have promotions throughout supermarkets may shed further light on buying wine as a FMCG during a grocery shop. In addition the apparent difference between the activity of putting wine into a shopping trolley rather than overtly 'buying' wine would benefit from further research

This study suggests that expectation of continual wine price reductions, perceptions of grocery shopping, the physical environment, time of day and the sheer ordinariness of the activity for many shoppers are all likely to inhibit overt wine shopping in supermarkets. Therefore, whilst the main promotional activities of the supermarkets remain based upon price promotions, whether real or perceived, it will be hard to encourage most consumers to increase their average bottle price. However this study did identify several areas for further research where trading-up might be actively encouraged despite current promotional strategies. Firstly, actual interaction with wine displays on preferred shopping routes for regular shoppers. Secondly, more effective deployment of the few wine knowledgeable staff that supermarkets employ to coincide with times when wine browsing shoppers are most likely to use supermarkets, including the use of more naturalistic tastings. A third area for further research is the development of a better understanding of the culture of reciprocal wine gifting. Finally this exploratory study suggests that research into the linguistic significance of the meaning of the term 'wine buying' amongst consumers, wine researchers and the wine trade is urgently needed. Further understanding of all of these areas may have the potential to encourage some consumers to actually trade-up rather than seeking a 'better' discount when buying wine in supermarkets.

Notes

1. Off-trade: any premises such as a supermarket which sells alcohol, intoxicating liquor, for consumption away from, off, the premises.
2. Off-Licence; a generic term for any off-trade premises but usually taken to mean specialist stores which only sell alcohol.
3. Morrisons sold their Northern Ireland stores to Asda in 2005 therefore they show as separate operators in Northern Ireland in some current research but not in others.
4. Waitrose is an up-market regional supermarket chain in the UK which consistently wins awards for the range and quality of its wines.
5. Trolleyed; a timesaving activity for a planned or impulse purchase where a required or useful commodity can be put into a supermarket trolley with little thought and no need to seek it out.
6. ISO tasting glass; a standard 215 ml glass used throughout the wine industry for tasting purposes. The glass should always be less than one third full when used during a tasting.
7. One unit of alcohol is 10 ml or 8g of pure alcohol.
8. DIY; do it yourself, shops which supply a range of goods for home improvements.

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