Identifying the UK Wine Consumer

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This Thesis is offered in partial fulfilment of the requirements of the University of Wales for the degree of Doctor of Philosophy

July 2006

The research described in this thesis was carried out in:

The Welsh School of Hospitality, Tourism and Leisure Management

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Cardiff CF23 9XR
Identifying the UK Wine Consumer

Declaration

This work has not been accepted in any substance for any degree and is not being concurrently submitted in candidature for any degree.

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This thesis is the result of my own investigation except where otherwise stated (a reference list is appended).

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Abstract

The purpose of this thesis is to attempt to profile the UK wine consumer to see who s/he is and why, who or what influences his/her behaviour. The study is not concerned with medical, health or illegal consumption issues. The impetus for this study was given when the author was studying for the internationally recognised trade qualification the WSET Diploma. In discussion with trade people in the cohort comments were made about the profile of UK consumers which were unrecognisable to the author but constantly reiterated by those working in the trade. Since the UK is currently the largest wine market by value in the world it seemed strange that those working within the trade had beliefs and perceptions about their consumers which did not seem to concur with the experiences of the author as a consumer.

Initial research showed that only seven academic papers had been written on the social UK wine consumer since 1989 when current purchasing and consumption patterns were beginning to be established. All of these papers had looked at the consumer in isolation and not attempted to investigate what external factors or groups might be influencing behaviour. During the research for this thesis four groups were identified all of whom moderated the purchasing and consumption behaviour of wine consumers in different ways: trade wine buyers, wine production companies, wine related media and the consumers themselves.

This thesis is based upon postmodern philosophy using a constructionist epistemology and critical realist stance. This enabled the use of a multi-strategy approach in which several ethnographic methodologies could be used producing a much richer set of data collection than a single method would have done. The variety of methodologies and methods included grounded theory, autoethnography, interviews, focus groups and participant observation and enabled a flexible inductive approach reacting critically to the data construed rather than imposing pre-conceived ideas and values upon the UK wine consumer as much of the wine trade and current academic theory has been doing.

The results of this thesis enabled a range of UK wine consumer profiles to be identified demonstrating both rational and irrational approaches to wine usage and showing how deeply wine usage has become incorporated into the culture of most social groups within the UK. The thesis also shows that all wine related behaviour is cultural, situation, occasion and gender dependant.

The adoption of a qualitative stance has enabled the identification of the behaviour of UK wine consumers to a depth impossible in traditional quantitative studies bound by the strictures and conventions of positivist methodologies. The depth of knowledge constructed adds significantly to our understanding of consumer behaviour in relation to the moderate purchase and consumption of wine rather than the immoderate and harmful behaviour which is already well understood and documented. This thesis demonstrates that there is much work still to be done in understanding exactly how wine is currently used in public consumption situations to demonstrate cultural and economic inclusivity or exclusivity from and by particular social groups. It also identifies the gulf of understanding between those who provide and hope to sell wine and those who use and consume wine by showing where there are discordant views between the stakeholder groups.

Finally, and unexpectedly, the lack of clarity in the use of wine related language and symbolism in relation to young and new consumers has shown that further research in this area would be of use not just to the wine trade and academia per se but would also help the teaching profession better understand how generational distance can impact upon the student learning experience.
Acknowledgements

The process of writing this thesis has been very long. The collection of the primary data was always interesting if sometimes frustrating and the academic research required has enabled me to develop my own knowledge far beyond my starting point. What started as idle curiosity has become a bit of a bug motivating me to become much more research active and to raise the level of my teaching beyond that which I might have done otherwise.

I should like to take this opportunity to thank all of those whom I have bored with my work over the past few years for bearing with me and providing support whenever I needed it. Specifically I would like to thank my Director of Studies Professor Eleri Jones, without whose support this thesis would neither have started nor have been completed, and my supervisory team Drs Annette Pritchard and Caroline Gilby (MW) whose constructive comments greatly enhanced my work. I would particularly like to thank Caroline for her assistance in enabling me to set up many of my interviews.

I should also like to thank my siblings and their partners most of whom found themselves assisting in my research whether they wanted to or not, via proof reading (Felix), assistance with the focus groups, (Diana, Tim and Tim) or as different types of wine consumers, (Jane, Kevin and Marbeta). Only geography saved you Susan.

Finally I need to thank my ‘technical support’ Mike Snelgrove for his patience and endurance without whom the final presentation would have been impossible.
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Glossary

**Alcohol by volume.** The European legal measure of the percentage of alcohol in any alcoholic drink.

**Buy One Get One Free.** Marketing tactic used to promote many consumer goods.

**Campaign for Real Ale.** An organisation set up within the UK in the late 1970’s as a reaction to mass produced beers to promote traditional ale styles.

**Cardiff Wine Tasting Circle.** A Cardiff based wine tasting group to which I, the author, belong.

**Flavoured Alcoholic Beverage.** A pre bottled flavoured alcoholic drink such as Smirnoff Ice or Bacardi Breezer

**International Standard Official glasses.** Tasting glasses, whose use is recommended throughout the wine tasting world to give a standard base measure, to help eliminate external variable when wine tasting.

**Multiple Grocery Chain.** A chain of supermarkets such as Tesco’s, Sainsbury’s, Waitrose or Marks and Spencer.

**New World.** Meaning those countries who have only in the latter part of the twentieth century started to make wines on an international, commercial basis, i.e. Australia, USA (especially California), Chile and New Zealand. Starting to make wine as a commercial, agricultural commodity their styles of wine are often considered to be simple, fruit driven and formulaic, requiring little specialist knowledge to understand.

**Old World.** Meaning those countries who have traditionally made wines, i.e. France, Spain, Italy and Germany, and whose styles and varieties of wine, because of climactic, historical and legal restrictions are often considered to be complex. Quality and style vary from vintage to vintage, labelling is traditional, regional and legalistic, and wide variety of small producers often require specialist knowledge to understand.

**Portman Group.** A UK government funded pan-industry body whose purpose is to review, commission and publish into the general public domain medical and other studies which, promote sensible drinking, reduce alcohol related harm, develop a better understanding of alcohol misuse and promote responsible marketing. One vehicle used for this is the publication of the Quarterly Review of Alcohol Research.

**Robert Parker.** American wine ‘guru’, widely respected for the integrity and independence of his comments on wine, his knowledge of wine and his ability to judge wines. Good ratings by Robert Parker directly affect the price and sales of wines particularly in Asia and the USA.

**Targeting Alcohol Related Street Crime.** A UK government sponsored project, connected to AHRSE, run by local police forces in conjunction with local community sponsors.

**Wholesale Company.** A company or organisation which, in this research, buys wine from source, i.e. the winery, and then sells it on to its final retail outlet in the UK.

**Wine and Spirit Education Trust.** A charitable, educational trust working within the UK and international wine trade to promote professional standards and qualifications.
Wine Broker A specialist company or individual who is, usually, commissioned by a wine/drink wholesaler, multiple grocery chain or other large organisation to find a specific wine or wine style.
List of Abbreviations

Abv  Alcohol by volume
AHRSE  Alcohol Harm Reduction Strategy for England, March 2004
BOGOF  Buy One Get One Free
CAMRA  Campaign for Real Ale
CAQDAS  Computer Assisted Qualitative Data Analysis
CWTC  Cardiff Wine Tasting Circle
FAB  Flavoured Alcoholic Beverage
FMCG  Fast Moving Consumer Good
ISO  International Standard Official
HLPA  Hectolitres of Pure Alcohol
TASC  Targeting Alcohol Related Street Crime
UWIC  University of Wales Institute, Cardiff
WSET  Wine and Spirit Education Trust
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Chapter One

Introduction

1.1. Background

As Crotty (2003) discusses when any research project is started it is usually because of some phenomenon about which there is no or only partial understanding that has been drawn to the researcher's attention:

we typically start with a real life issue that needs to be addressed, a problem that needs to be solved, a question that needs to be answered. 

(Crotty, 2003, p.13)

The questions that this thesis will be addressing are “who is a UK wine consumer and why?” and “who or what influences their behaviour?” The phenomenon which set this research in progress is the significance of the UK to the world wine market, table 1.1. Although the UK is not a large country in comparison the USA or China and does not produce enough wine for it to register

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in its own right in international statistics it is the largest retail value importer of wine in the world and is set to continue to be so.
Still light wines, or table wines, are those non-sparkling wines which fall between 1.2% alcohol by volume (abv) and 15% abv, the majority of wine consumed throughout the world (Vinexpo, 2005). The drinking of still light wine has increased dramatically in the UK since the 1970s (Jenster and Jenster, 1993):

*the wine market expanded by 30% between 1999 and 2003, [following a 34% growth rate in the previous decade] and this was a faster rate of growth than most alcoholic drinks. For the next five years (2004 – 2008) Key Note forecasts a slightly slower growth (27%), so that over 10 years the market will have grown by 73%, reaching £13bn in 2008.*

(Key Note Ltd, 2004, p. 79)

Current UK spending on wine, £13,565 million (ACNielsen, 2005, p. 118), represents approximately 33% of total spend on alcoholic beverages, which for many years ‘has accounted for about 5% - 6% of total consumer spending’ (Key Note Ltd, 2004, p. 10).

In a developing market of ever increasing world production and in the case of the UK consumption, figure 1.1, who is the UK wine consumer and what are the social and cultural influences prompting them to buy and consume ever increasing amounts of wine?
The impetus for this thesis arose when I was studying for my Wine and Spirit Education Trust (WSET) Diploma, one of a series of trade qualifications recognised nationally and internationally throughout the wine trade. I was unusual within my cohort in not working directly within the trade but rather as a lecturer within a university school of hospitality. During discussion with other members of the cohort throughout the two year course the UK wine industry was discussed in all its aspects. One aspect many of those currently working within the UK wine trade commented upon was the UK wine consumers' behaviour and it became apparent that whilst many of the statements made by them were widely accepted within the wine trade I did not feel that the behaviours described were particularly relevant to consumer behaviour that I actually observed or to comments heard during normal conversations with family and friends. Examples of comments made were; all consumers find wine buying very stressful; all palates mature and all consumers will eventually change from sweet white wine to heavier reds; all consumers as they drink more wine will want to trade up in price and quality; men drink more red wine and women prefer white. They never discussed what a UK wine consumer might be like nor what might motivate them to behave as they do.

Subsequent research showed that whilst there had been some qualitative research undertaken particularly in the New World wine cultures such as Australia which may have relevance to UK wine consumer behaviour there has been very little academic research into the UK wine consumer and their behaviour. Only seven academic papers have been published during the period 1989 to 2006 (all discussed in the literature review). The current data which exist are quantitative or technical: quantitative data such as top selling brand and consumption statistics from market research sources such as Key Note Ltd, Wine Intelligence or Mintel; technical details such as harvest sizes and quality from specialist magazines, e.g. Decanter and Wine and Spirit International, or books e.g. Burgundy by Anthony Hanson (1995). There has been little or no analysis of the socio-cultural phenomena which have prompted the rapid increase of wine consumption within the UK.
In light of this, the other members of the cohort were challenged to justify their beliefs with regard to wine consumers' behaviours and the answer always came back 'but everyone knows that's what consumers do' - what more was there to say on the subject? The trade wine buyers were displaying typical aspects of the phenomenon of reification as discussed by Crotty:

*we tend to take 'the sense we make of things' to be 'the way things are'. We blithely do that and just as blithely, hand on our understandings as quite simply 'the truth'.*

(Crotty 2003, p. 59)

The other members of the WSET Diploma cohort were able to discuss marketing functions such as the amount of wine bought in specific on or off-trade environments but seemed unaware, for instance, that knowing that more women buy wine on their store cards in supermarkets than men does not explain what caused the women to make the purchase nor if they might repeat it. Without seeming to be aware that the beliefs they held about consumer behaviour appeared to have little or no proven foundation, this cohort of professional people were entering into or further pursuing their career within the world's largest import market for wine (by value), see table 1.1, with neither an understanding of their consumer base nor the awareness that they had so little understanding of the sociology of their customers. Neither did they seem aware of the implications of their purchasing decisions upon the consumer.

### 1.2. Identifying Myself

As the previous section demonstrates I am both a wine consumer and a trade practitioner. Wine was available within the household as I was growing up and it forms a significant part of my social life. My part time work as a school pupil was generally within the hospitality industry which led me to take my first undergraduate qualification, an HND in Hospitality and Catering Management from Portsmouth Polytechnic. After completing polytechnic I spent ten years working in the hospitality industry before starting to teach at Waltham Forest College of Further Education. At Waltham Forest College I was given responsibility for teaching the WSET Intermediate course to hospitality and part time students and my 'formal' interest in wine
developed from there. Until this time my work with wine was detached, it was just one part of the package the hospitality consumer bought into. However once I began to teach and had to research into wine in a structured way my personal interest grew until I became the trade knowledgeable and expert consumer that I am today, discussed in detail in chapter four.

As a result of my involvement with wine this thesis will be written in the first person where appropriate using terms such as ‘I’, ‘me’ and ‘my’ rather than the neutral ‘the author’. As both Cockburn-Wooten (2002) and Westwood (2004) show when the academic researcher can be considered to be part of the population sample for a study it is appropriate and logical to include their personal experiences as part of the data gathering process.

1.3. The History of Wine Consumption within the UK

The consumption of wine as with other forms of alcoholic beverage such as beer is no longer a necessary behaviour for our survival (Barr, 1995: Charters, 2004). As Barr (1995) discusses we must drink in order to survive but there was a time in our history when water was so dangerous it was unwise to drink it, especially in urban areas therefore the beverages of choice were milk, beer / ale and wine. Milk came straight from the cow while the other alcoholic style of drinks were fermented so all these had inbuilt food safety/ hygiene factors. The ancient Greeks (Briers, 1990) viewed the provision of cool, fresh, safe drinking water to guests as a symbol of great wealth and power, indicating access to or ownership of an adequate; far more impressive than the provision of great wine or other forms of alcoholic and therefore safe beverages.

With the introduction of hot beverages, tea, coffee and hot chocolate, at increasingly accessible prices during the eighteenth and early nineteenth century necessary dependence on alcoholic beverages declined and ceased altogether with the foundation by the Victorians of modern fresh water and sewage systems. However the consumption of wine and beer (and more latterly

\(^1\) Now the University of Portsmouth
spirits) remains part of our cultural heritage; historically the choice of beverage (including alcohol) was taken as an indication of social class. Beer was usually the alcoholic drink of choice for the working classes, wine for the upper and aspirational social classes (Barr, 1995).

Since the introduction of New World wines sold via multiple grocery outlets in the 1970s (Jenster and Jenster, 1993), this has changed with the overall consumption of beer (including lager) falling and over-all consumption of wine rising across all social classes, although consumption has different penetration levels for each socio-economic group (Mintel, 2003a).

Detail from ACNielsen (2005, p. 26) shows that we still consume far more beer than wine but that the movement from beer to wine consumption is a long term trend. The introduction of Flavoured Alcoholic Beverages (FABs) in 1995 affected beer/ lager and spirit consumption rather than wine consumption.

<table>
<thead>
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<td>Beer (Litres)</td>
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<tr>
<td>----------------</td>
</tr>
<tr>
<td>1984 141.0</td>
</tr>
<tr>
<td>1994 128.8</td>
</tr>
<tr>
<td>2004 123.9</td>
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NB. From 1995 until 2001 FABs were included in the made wine statistics, but as the majority are spirit based they were moved into the spirit category in 2002

Table 1.2: UK per Capita Consumption of Alcoholic Beverages; Adults aged 15 and over. Adapted from ACNielsen, 2005, The Drink Pocket Book 2006, WARC, p. 26.

So why, if it is no longer necessary to consume wine to drink safely, is the consumption of wine in the UK increasing, when it is deceasing in many of the traditional wine production and drinking counties, see figure 1.1?

Accessibility and ease of purchase is likely to play a part. More wine is being produced worldwide and more is being imported into the UK (Vinexpo, 2005). One reason for this was the development of wine production in new wine growing areas of the world. These new producers actively sought out international markets and as a large importer without national wine production the UK was an obvious target market. These new producers targeted the
supermarkets and wine moved from being an object that had to be sought in specialist outlets to part of the general supermarket run. In 1975 there were 82,310 on-licensed and 31,644 off-licensed premises, by 2001 this had increased to 110,256 on-licensed and 44,696 off-licensed premises (ACNielsen 2004, p. 193) and because of this influx of wines prices in real terms have barely risen since 1998, approximately 1% in the off-trade (Key Note Ltd 2004, p. 14).

Medical research into wine consumption and its attendant publicity may also play some part in this increase. Whilst the negative effects of immoderate alcohol consumption are well documented, increasingly the moderate consumption of alcohol, especially wine, is seen to have quantifiable health benefits for most groups of adults as discussed in the Portman Group Quarterly Reviews, Finkel (1996), Troncoso et al, (2001) and the UK Government’s Alcohol Harm Reduction Strategy for England, (AHRSE) (2004). Accessibility, lower cost and health are all likely to be part of the reasons for increased wine usage but are unlikely to be the whole story. Charters (2002) suggests instead that it is culture plus availability that are the main drivers.

Wine purchase and consumption have to be considered as being embedded in our culture as part of our social heritage but whilst it may have the property of a symbolic object in some situations in others it is just another drink, albeit alcoholic. The question is how is wine embedded in our culture, how do we perceive, use and relate to it, and why is UK purchasing and consumption increasing?

Wine purchase and wine consumption are considered to be different although related activities since wine may be purchased by one person for another’s consumption or for their own.
1.4. The Relevance of Qualitative Research into the UK Wine Consumer

There is academic relevance in the study of consumer behaviour *per se* and there are many studies of the role and use of food in current society (Bell & Valentine, 1997: Lupton, 1998: Williams, 2002: Sloan, 2004). There are also many studies on the medical, health and societal harm aspects of alcohol and its abuse, AHRSE (2004) or the Portman Group reports for instance. However the study of social, moderate purchase and consumption of alcohol, specifically of wine, and the phenomena associated with that behaviour by the UK consumer has not been paid any significant qualitative attention:

*despite the vast outpouring of literature devoted to the analysis of food consumption, it [wine] is a subject that has largely been ignored, even though wine stands out as a distinct object of sociological inquiry because of its syncretic nature.*

(Demossier, 2004, p. 93)

As Charters (2004) discussed in his study on the perception of the meaning of wine quality, this type of study also has relevance to the wine industry *per se* and the wider food and drinks industry generally as a potentially significant marketing tool.

It is also anticipated that with the changes to liquor licensing law in England and Wales (Licensing Act 2003), the implementation of AHRSE and other UK Government policies and the likely development of new types of establishments whose sole product is alcohol and ambience, there may also be value in this research for those teaching within the hospitality sphere. This study therefore has both an academic and pragmatic value and will add in several different ways to the general body of knowledge about UK consumer behaviour and specifically to our understanding of the UK wine consumer.
1.5. Framework for the Research

Since consumers do not act in isolation separated from their environment and other users of ‘their’ space it was initially suggested that there were likely to be three stakeholder groups actively influencing behaviour: consumers and their individual habitus; the trade wine buyers who made it possible to buy wine; and the media who raise or create public awareness about products and services. Each of these groups are considered in turn below.

1.5.1. Trade Wine Buyers

The trade wine buyers in many ways identified themselves as a group; if wine was not made available to the consumer it could neither be purchased nor consumed. At the one end of the spectrum the trade wine buyers choose what wines are available for purchase in retail or direct mail outlets and at the other end unit staff have direct contact with the consumer and may influence how and what they buy. The main themes to be investigated here were what influenced the trade wine buyers’ choice of wine: what did they choose to stock and what to reject; what influenced choice by a particular type of retail outlet (or type) for a particular wine (or style); what specific strategies did the trade wine buyers use to try to influence wine consumers if any?

1.5.2. Media

Since we are all influenced (Louw, 2001: Jackson, 2005), often unconsciously, by what we hear and see all around us the media was also identified as an influencing group. The producers of media were taken to mean those involved in the dissemination of wine related information by any of the various media available, e.g. TV, radio, journals, newspapers and books. Initial research quickly established that all media personalities work within more than one medium, i.e. Jancis Robinson is, amongst other activities, a TV presenter, author and weekend newspaper
columnist (see table 4.2). It is likely, therefore, that the same producer of media will have different levels of influence in differing situations.

1.5.3. Consumers

The consumer and their interaction with wine is obviously vital to any study of wine consumption patterns. Various writers from Bourdieu onwards have demonstrated that each consumer's behaviour varies with their own cultural history or cultural capital and that wine can be used as part of their social and cultural capital. It is also likely that the purchasing and consumption of wine is also affected by individual emotions at the time of purchase or consumption and the reason for the purchase or consumption occasion.

It should be noted that most people involved in other aspects of wine, production, distribution, marketing and publicity are also 'keen consumers of the product' (Charters, 2004, p. 19). Their personal consumption patterns were not taken to be automatically relevant to this study. Consumers in the sense of this study are taken to be those whose role in the process is to buy and or consume the wine in either a domestic or retail environment.

1.5.4. Wine Producers

During the early stages of the primary data collection process it was suggested by the trade wine buyers that there was also fourth group involved, those New World wine producing companies who dominate world wine sales within the UK. These are the producers who are currently planting new vineyards and or setting up new wineries or simply increasing production of wine generally in New World areas such as Australia and the USA as well as in the Vin de Pays regions of France: companies such as Constellation, Southcorp\(^2\) and Gallo. It is very time / capital consuming to create a new vineyard. In 1999

\(^2\) Now owned by Fosters Group Wine Estates
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Hardys [part of the Constellation Group, currently the largest wine business in the world] were looking at a business plan for 2007 ... if you have to start planting the vineyards, [for] the vineyards to produce in five or six years time that is 2007.

(MGC1)

Besides requiring long term planning it is also expensive to create a new vineyard because it can cost up to 10,000 euros per hectare to plant a new vineyard in the south of France not including the winery. (This approximate figure was established during study tour visits to this part of Europe.) Many of the trade wine buyers suggested that these large international companies (created during recent national and international consolidation processes) were likely to have a marketing plan for their new wines to offset the large initial capital layout as quickly as possible. The trade wine buyers also suggested that these huge production companies were

![World surplus / evolution](image)

Figure 1.2: World Wine Surplus 2004 – 2008. VINEXPO, 2005, p. 5.

significant influencers because if planting and wine production continues at its current rate the world surplus of wine will continue to grow and is likely to reach 31,136 million hectolitres by 2008 (Vinexpo, 2005), see figure 1.2. Trying to sell into the already very competitive UK and world wine market would then become ever more difficult. It was suggested that these companies would have a marketing strategy thought through before new vineyard or winery investment began.
1.6. The Aim of this Thesis

The purpose of this study is to investigate the social and cultural phenomena which influence the purchase and consumption of light wines within the UK enabling the construction of verifiable theory identifying the UK wine consumer. As Strauss and Corbin (1994) discuss:

*the construction of theory consists of plausible relationships proposed among concepts and sets of concepts.*

(Strauss and Corbin 1994, p. 278)

This will be done by:

- Analysing all available literature. This will include an analysis of trade articles as well as academic research and include wine consumption and consumer behaviour. It will also include a review of statistical and other forms of quantitative data.
- Gathering primary data from all of the stakeholder groups: trade wine buyers, wine producing companies, wine media personalities and consumers. The knowledge gained from each group will inform the data collection for the next study group constructing a stockpile of knowledge.
- Developing a theory which identifies the UK wine consumer and models the motivators of UK wine consumer behaviour.
- Recommending themes for future research which will test the theory developed in this thesis

1.7. Summary

This chapter identified the rationale for and the aim of this thesis. It has shown that although the UK is a major consumer of wine there is very little research into what motivates this consumption nor into the identification of the UK wine consumer. It has also identified that there are significant differences between the wine trades' perceptions of the UK wine consumer and the experiences of myself as a consumer. Exploring and identifying these gaps will enable
the wine trade to better understand their consumers and academia to expand their knowledge of this aspect of consumer behaviour.

Because of the lack of research into the UK wine consumer chapter two will review and analyse the literature in the trade press. It is considered necessary to review these non-academic sources of information for two reasons. One is the lack of other current UK consumer based literature and secondly as these articles are written specifically to inform and persuade those active in the UK wine trade they reflect the attitudes, perceptions, beliefs and dilemmas currently prevalent within the trade. The review of these articles will bear in mind that they are unrefereed opinions.

Chapter three will review the academic literature available. Each of the seven studies on the UK wine consumer will be identified and reviewed. All other relevant academic studies will also be reviewed and analysed and their relevance to the UK consumer assessed. It will become apparent in the subjects discussed in this chapter that the areas in which there has been academic research are not homogenous and therefore that there are gaps in our knowledge of wine related consumer behaviour which this thesis intends to address.

Chapter four will discuss the philosophical stance taken throughout this thesis. It will also explain and justify the different methodologies used to gather data from the different stakeholder groups, each study building upon the data gathered from the previous study. The reliability and validity of these methods will be critically assessed along with the sampling techniques used.

Chapter five is the first of the chapters presenting the results of the primary data collection. In this chapter the results of the trade wine buyer interviews are presented. The twenty seven interviews resulted in trade wine buyers being classified into eight different types of buyer, highlighting the fact that some groups are much more powerful than others. The issues that
were of concern to these groups are presented showing where there was a homogenous view with regard to some issues and where there was discordance.

The data collected and analysed for chapter five formed the basis of the data collection for chapters six and seven. Chapter six presents the results of in-depth interviews with the three wine producing companies with the most significant presence in the UK market. All three companies were primarily New World wine production companies and whilst it might seem that three interviews would compare badly against the depth of data collected by the twenty seven trade wine buyer interviews the wine production company representatives had very similar issues and perspectives. In some instances their issues were the same as those of the trade wine buyers but in other instances they raised new points particularly highlighting areas of tension between certain of the trade wine buyer groups and themselves.

In chapter seven the views of the media personalities are presented. Five interviews were conducted, although six wine media personalities participated in the research as discussed in detail in the chapter. The interviews established that there are three types of wine media personalities often with different and competing agendas. The different types of wine media personalities had very different perceptions of the wine consumers and were often in disagreement, however unlike the trade wine buyer groups no one group was more powerful or influential overall. The three different groups wielded their influence with different types of wine consumers whom they were able to identify much more accurately than the trade wine buyers. However the wine media personalities also questioned the rationale for their own existence and the real extent of their influence and usefulness.

In chapter eight the results of six focus groups with wine consumers are presented. The interview document and format for the focus groups was developed from the data gathered in all three previous study groups. The results show that much of the early literature about UK wine
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Consumers is dated and no longer relevant. They showed that the UK wine consumer has a wide range of motivations for interacting with wine which are situation, occasion and gender based. It also identified that a large section of the wine consuming population are completely uninterested in the wine that they buy and consume. At the other end of the scale there are other wine consumers who use wine exactly as described by Bourdieu to demonstrate social, cultural and financial capital.

Chapter nine brings all of these results together analysing where there is agreement and where there are differences between the stakeholder groups. By collating and analysing all of the primary data it is possible to identify the profiles of current UK wine consumers. This collation of the results also supports my original contention that many of the trade wine buyers in the UK have very little idea about what actually motivates the UK wine consumer to buy and purchase wine. It demonstrates that, apart from the uninterested consumers, most UK wine consumers display very sophisticated buying behaviours, reflecting the fact that wine is now embedded in our culture and is used for complex social and cultural purposes as often as it is bought for simple consumption purposes.

Chapter ten reviews the theory developed during this thesis and discusses how it adds to the body of consumer knowledge. It also shows how this knowledge could be used by the wine trade to influence their marketing and the development of future consumers. The chapter reflects back on the processes undergone during the research period, my own self development as a researcher and the addition to my own personal knowledge which leads through to my teaching. It also recommends further research to test the theory developed throughout this thesis as well as other areas for further research which have been identified during this thesis.
# Chapter Two

**Literature Review – The Wine Trade Perspective**

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Literature Review – The Wine Trade Perspective

2.1. Introduction

As mentioned in the Introduction there is very little academic literature relating specifically to the UK wine consumers. It was therefore decided that there would be value in reviewing wine related trade and consumer magazines to identify what the wine trade and wine journalists see as important current issues. Statistical data has also been included in this chapter and throughout the thesis as it helps to support or challenge the issues raised adding depth to the research. Where appropriate the data in this chapter is related to theoretically based research, but most of the theoretically based research is discussed in chapter three establishing where there is commonality and where the wine trade and academia have differing issues.

2.2. Australia’s Success Story, Rationale and Future Threats

The rapid expansion of the UK wine market since the 1970s was due in significant part to the introduction of New World styles of wine (Jenster and Jenster 1993: NTC Publications Ltd, 2000) as epitomised by the largest off-trade importer to the UK, Australia (AC Nielsen, 2005). One approach to looking at the New World wine industry and rationale for its success internationally is that of Aylward.

It is apparent that while the New World wine industries are bringing significant changes to the global wine landscape in terms of the way wine is grown, produced and marketed the R&D ‘models’ used to support these industries are quite different... the size of the industry and degree to which it is centralised appear to have little to do with the coordination of the R&D innovation.... What is clearer, however is that the effectiveness of these ‘innovation territories [Australia, California, New Zealand and South Africa] and mechanisms is determined to a large extent by funding structures and the application of that funding to R&D. Australia’s operator levy for R&D is amongst the highest in the world.

(Aylward, 2003, p. 42-43)

Aylward is suggesting that part of the reason for the success of New World wines is their attention to research and development in a way that the Old World wine producing countries
can't or won't consider. The Australian government tax levy to a great extent funds 'Brand Australia', and the research that goes into developing new markets. This view is supported by Zhao et al (2003); Hoffman (2004) confirms the degree of seriousness with which the Australian government views the wine trade by pointing out that both the University of South Australia and Edith Cowen University offer graduate and postgraduate qualifications in wine marketing. Charters (2002) would add to this that Australia also has the perfect climate for large volume wine production:

- the warm climate allows large volumes to be ripened,
- there is the greater likelihood of the full crop ripening every year,
- consistent volumes are produced which can be blended according to market demand,
- enabling a consistent taste for each wine or vintage to be made.

This climate is not available in many of the Old World wine production regions. However Seguin et al (2006) would all argue that as the world climate is slowly changing the effect upon European traditional wine growing regions such as Bordeaux is to enable grapes to reach a higher phenological ripeness than in previous decades supporting Bruce-Gardyne's (2006) view that many traditional wines styles currently on the UK market have a much higher residual sugar level than earlier versions of that same wine.

Mass wine production began when demand for dairy products significantly reduced (Jenster and Jenster, 1993) so wine was approached and administered as an agricultural product enabling wineries to be viewed as factories and not as workshops crafting cultural icons. Australia exports, on average, two thirds of all the wine it produces annually (Beckett, 2005, p. 38), and any reduction in this caused by international change would have serious repercussions for the Australian economy. This view is supported by the recent evaluation of 'Brand Australia' discussed by Hibberd (2005). Murphy (2003) suggests that because the general image of Australian wine has been established as the fruity accessible wines from well known grape
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varieties there is a significant potential for boredom with the product to set in. In order to remain ahead of the market 'Australia has to start re-mystifying wines so that the interest of the consumer is maintained' (Murphy 2003, p. 25).

Currently several vineyards and wineries have been bought, or are being developed in the south of France, Italy and Spain, by multinational companies such as BLR Hardy / Constellation and Kendall Jackson. Chaney (2000a) (UK on UK study) raises the point that producers in the new world are invariably

\[ \text{at a distance from the UK and, thus, transportation costs are an issue in determining which wines will be shipped.} \]

(Chaney 2000a, p. 7)

She also highlights the reduced economic barriers for countries trading within the EU and therefore suggests a rationale for the behaviour of these companies, such as Constellation. These companies are heading up significant changes in European production; mass consumption New World wines are currently made in Old World countries with suitable climates by multinational organisations which package them to look like New World wines; conversely these New World companies package their premium and fine wines to look like Old World wines.

2.3 The Price Quality Relationship

Mitchell and Greatorex (1989, p. 34) suggested that informed consumers would not buy wines promoted as being 'of reasonable price' because they would be perceived to be inferior. Quester and Smart (1996) evaluated the role of price in purchase behaviour and suggested that:

\[ \text{consumer perceptions of quality are not based on the taste of the wine itself, but almost exclusively on price.} \]

(Quester and Smart 1996, p. 42)

They stated that:
If price contributes to financial risk, then the less involved consumer may wish to minimalise the potential loss resulting from the purchase of an unsuitable wine by selecting the cheaper alternative. When high quality wine was sought, for a special occasion or because of social influences, the less involved consumers would also be likely to use price as a prime indicator of the suitability... prefer to buy the more expensive ones. Conversely... highly involved consumers... could deem price to indicate quality... to support more expensive choices, while the importance of price per se may not differ between the two groups the ideal price level would contrast markedly.

(Hoefmann and Smart 1996, p. 51)

Hoffmann (2004) supports this view showing that ‘price and recommendation were the most common factors in influencing the final purchase’ (Hoffmann 2004, p. 88). Lockshin and Rhodus (1993) showed that wine wholesalers, tested in an entirely similar way to Hoefmann and Smarts (1996) consumers concluded that price was not a factor in quality suggesting that there is a difference between these groups of language, knowledge and or perception. However Bruwer et al (2002) questioned the current accuracy of Hoefmann and Smart (1996) and Mitchell and Greatorex’s (1989) work as their research showed that:

sophisticated wine consumers don’t always spend more money, but recognise value and trade down... and are sometimes searching for a more individual wine style.


Thompson and Vourachis (1995) suggested that:

a possible explanation of this lies in the exceptionally wide range offered by wine companies, which means that individuals can easily find a price/quality level to suit themselves.

(Thompson and Vourachis 1995, p. 42)

Johnson and Bruwer (2004) identified and added a further stratum to this duality; there are some groups who would not buy above certain prices ($15 AUS) and those who would not buy below that price. This would indicate that different consumer types, as well as different groups involved in the sale and consumption of wine have differing perceptions of the price / quality relationship. Dodd (1997) shows that whilst price is a major factor for some sections of the market:

in the ultra-premium segment (priced $10.00 and above) quality and reputation are more important to consumers.

(Dodd 1997, p.126)
The work of Steiner (2004) and Richardson and Dennis (2003) in the UK and Bruwer et al (2002) in Australia would suggest that some groups of consumers have become very sophisticated using shelf price and knowledge to increase or decrease purchase price as they deem suitable according to the occasion for and purpose of the wine purchase.

2.4 Brands

The UK, and world, wine market is unusual in that unlike most FMCG categories the world of wine is not dominated by large brands:

\[
\text{indeed the largest brand has only about 5\% market share. Compared to Apple i-Pod which has 90\% of its global market share or Heinz ketchup which has 70\%, our brands just aren't the same.}
\]

(Brownlie 2005, p. 66)

Whilst there is a large amount of literature relating to brands in general, this phenomenon of the proliferation of brands suggests that there are three aspects which are unique to wine: what is a brand in wine terms; how do brands impact upon wine consumers; what business strategies are used within the wine trade relating to brands and branded wine?

2.4.1 Identification of Wine Brands.

Aaker (1996) describes a brand as 'a strategic asset that is key to long term performance and should so be managed', (Aaker, 1996, p. vii). Within the drinks industry products and names such as Coca Cola and Fosters would be good exemplars of easily identified brands. ACNielsen (2005, p. 80) shows that the top five lager brands have 75.7\% of the UK off-trade market indicating that brand identities react conventionally within the beer market. In contrast, as previously discussed, the top five brands of wine only have 34\% of the UK off-trade market (ACNielsen 2005, p. 123)
Several reasons are suggested to explain the low level of branding within the wine trade. As Aaker discusses, it is a common business strategy to ‘associate one’s brand with a country or region that will add credibility’, (Aaker 1996, p. 82). Whilst this can be very successful in some respects (van Zanten and Bruwer, 2002; Arais-Bolzmann et al, 2003) in others it can lock in an image which is hard to shake off: i.e. because of the original decision to work together for marketing purposes Australia itself has come to be perceived as a brand by some consumers. Gluckman confirms this point and suggests that:

> advertising by government-funded agencies of wine producing countries is likely to increase as their domestic consumption decreases and wine lakes increase. Hence, concepts like Beaujolais, etc., will continue to receive an ever increasing amount of advertising support.

(Gluckman 1990, p. 43)

Despite European Union restrictions it is politically easier for a government to support a generic promotion than a single or multi company one and the second largest wine advertising campaign in 2003 was for Bordeaux wines (Key Note 2004, p. 49); however these promotions reinforce the idea of country or region as brand rather than enabling individual brands to become identified. Atkinson (1999, UK on UK study) confirms that within the European Union wine regulations have historically made the development of large single brands difficult so that production generally remains piecemeal. This means that:

> faced with this apparent proliferation, consumers buy on words they recognise. It stands to reason then, that from both a simplicity and an exposure standpoint, what sticks with the occasional Rioja drinker are not the brands of the twenty of so Riojas he or she has been exposed to this year but the name ‘Rioja’.

(Atkinson 1999, p. 230)

For other consumers it may be the grape variety that acts as a brand name. Varietal labelling was a deliberate policy instigated by the New World wine producers in their initial efforts to demystify labelling so that consumers would be able to recognise and understand what they were buying, reducing risk and making repeat buying easier.
For a few wines, such as Jacob’s Creek and Blossom Hill, their brand name is recognised as such. Where the brand name is recognised for what it is these wines tend to be mass consumption wines created fairly recently without a designated region, so that blending can ensure ‘a consistently pleasing taste experience commensurate with the money expended’ (Croser 2004, p9). Atkinson (1999) also suggests that in a ‘product class as inscrutable as wine, consumers will tend to take their quality [and reassurance] cues from price’, (Atkinson 1999 p. 233), indicating that price may be being used in the same way as a familiar brand is used in other FMCG categories, a point confirmed by Halstead (2002). As Halstead (2002) discusses in wine terms both consumers and professionals within the wine trade may use country, region, grape variety, actual brand name and price as synonyms for brands. Some may be conscious that these descriptors are not brands but most are not.

2.4.2. The Meaning of Brands for Wine Consumers

As discussed earlier the use of brands in the wine market introduces a fundamental paradox. Whilst for the novice or uninvolved consumer brands can provide reassurance and ease of purchase for the involved, discovery and aspirational consumer mass consumption brands are a significant disincentive to purchase. Aufenast (2002) and Chaney (2000a) also suggest that since wine consumers consume different wines on differing occasions they are rarely brand loyal, even when they buy within the branded wine sector. The question therefore is if wine producers want consumers to consume more and trade up, do they actually want to concentrate the market into a small number of brands gathered around similar price points?

2.4.3. Business Strategies Related to Brands and Branding

As previously discussed the Australian market is dominated by a small number of large companies and a review of the top UK branded wines market (Knott, 2003) shows that the small
number of organisations dominating the UK market each produce a different number of brands, e.g. the Penfolds range consists of 38 different wines:

*in the 1970s the most successful brands were those like Blue Nun and Mateus Rose ... they were single SKU brands, but they were right for the relatively unsophisticated wine nation we were then. Then along came Jacob's Creek, with different flavours at the same price point. This extended their shelf life and their popularity. And now, of course, we have vertical brands, which allow movement up and down without having to move out of the brand.*

(Simon Legge Marketing Manager Brown-Forman Wines, quoted in Hibberd 2003, p.19)

Hibberd points out that whilst the wine companies may intend to retain customers many do it by having differently named wine ranges, both at the same and different price points, i.e. the BRL Hardys ranges such as Banrock Station, Stamp, Nottage Hill, or VR.

*It appears, then, that for the more premium brands at least complexity in a brand is no bad thing. As ex-Southcorp man Mike Paul says: 'I have always said that the day the consumer understands Penfolds is the day they decide to buy something else.'*

(Hibberd 2003, p. 20)

This would confirm a point previously raised that because wine has a multi-functional aspect it needs to retain some aspects of mystique otherwise it would lose its interest for a significant section of its consumers.

Hibberd (2003) supports the contention that some wine producing companies, whether deliberately or not, are employing economies of scope to maintain and enhance their market share rather than conventional brand dominance. It may be that the large international wine companies, those few who could afford to mount and sustain a significant marketing campaign, are adopting a business strategy which deliberately encompasses economies of scope partly because of the agricultural and therefore potentially uncontrollable variations in quality annually and partly to ensure that differentiation is maintained particularly within the premium and fine wine markets.

Balasubramanyam and Salisu (1994) discuss the point that 'brand proliferation by existing producers is a much more effective entry deterrent than either price cutting or advertising',
(Balasubramanyam and Salisu 1994, p. 62) citing the example of the six dominant cereal producers in the USA who produced over eighty different cereal brands and prevented any other significant entry into the market. In simplistic terms since the largest producers generally vinify, press and ferment each batch of grapes separately at the point of blending they can choose to replicate the same wines as last year, allow vintage and terroir variations to show in the final wine, or decide to make a new wine dropping less successful brands from last year as they go and they can do this every year without any significant extra investment. As Balasubramanyam and Salisu (1994) point out:

*economies of scope are said to exist if the cost of producing a number of products jointly is less than the total cost of separate production of each of the products.*

(Balasubramanyam and Salisu 1994, p. 63)

In the case of a large winery changing or retaining a particular wine style is very easy to do and to some extent this technique has always been practised via the blending and maturation processes. Hibberd (2003) confirms that the ability to change varietals within a range, extend a range, or produce a new wine range enables the wine producers to retain great flexibility and respond quickly to market demand. Lockshin (2004a) notes that in order to reduce costs whilst maintaining a wide range of wines (as perceived by consumers):

*buyers simplify their jobs by sourcing as much wine as they can from the fewest sellers (large companies), who have responded with ever-expanding labels and brands aimed at different price points.*

(Lockshin, 2004a, p.30)

So although media articles often discuss the lack of brand penetration and suggest that all wine producing companies want to increase their market share, which they obviously do, many wine producing companies may deliberately not seek overt market dominance via a single brand name particularly for their aspirational wines. Aspirational wines are those which the wine trade hopes the consumer will aspire and trade up to as they become familiar with entry point wines.
2.5 Media and Marketing to Wine Consumers

Research relating to the media and marketing have been put into the same section, because they are considered to be interrelated. Not only do research articles often discuss both subject areas in the same article but researchers such as Reid \textit{et al.} (2001) and van Zanten and Bruwer (2002) suggest that for the wine industry (particularly in Australia and New Zealand) a holistic Integrated Marketing Communications strategy is the most effective type of marketing strategy involving all stakeholder groups and all forms of marketing or promotional activity. This process starts at regional level involving:

\begin{quote}
the forging of links across a variety of regional interest groups (not just amongst winemakers and grape growers) and the integration of the regional vision into everything that the region does.
\end{quote}

\hspace{1em} (van Zanten and Bruwer 2002, p. 96)

Whilst some stakeholders might feel that promoting others' brands or products could be detrimental to their own wine (or other product) sales van Zanten and Bruwer (2002) and Reid \textit{et al.} (2001) confirm that the 'feel good' factor which a consumer receives when investigating any wine region / company and receiving consistent positive and helpful information makes them feel good about the region and its product as a whole. Consumers do not use all information they have about a wine but use decision heuristics to make their choice and van Zanten and Bruwer (2002) and Arias-Bolzmann \textit{et al.} (2003) show that one attribute always used when making a decision to purchase is region or country of origin.

2.5.1. Marketing Orientation

The theme of not being conventionally market / brand orientated, runs through the marketing literature related to wine and wine consumption and is encapsulated by Bruwer \textit{et al.} (2002):

\begin{quote}
In the 'classic' business orientation development cycle, organisations move sequentially through the stages of first having a production orientation, then a sales orientation until finally reaching the marketing orientation stage. Unlike many high-technology driven or service industries, the wine industry is deeply rooted in traditions and primarily agricultural based at the starting point of its long value chain. Whether this explains the apparent tardiness of the industry to embrace and fully adopt a marketing orientation is unclear.
\end{quote}
As discussed in the previous section wine is an agricultural product whose final attributes, taste, availability, price etc., may not be known until after the wine has been made and is ready for sale this together with the use of economies of scope to enable swift and flexible reaction to both annual product changes and market demand may explain why overt brand domination and marketing orientation do not appear to follow the conventional routes.

Another factor which would reduce the value of brand domination is identified by Randall (2002) and although his work is related to food it has parallels with wine consumption attributes. Randall (2002) comments that:

> entrepreneurs have harnessed the expertise of the media industry to promote innovatory consumer products not according to their use value, but with secondary terms of their status as class markers and emotional or lifestyle meanings. These secondary values control the real exchange value of the product in the market and it is to these values that media production is targeted.

(Randall 2000, p. 121)

If mass consumption wine purchases are driven by price and familiarity, aspirational and fine wine purchases are driven by self discovery and self perceptions of value. Media use and marketing have to be targeted to these values.

### 2.5.2. Budgets

As previously discussed the wine industry is very fragmented both in terms of ownership and the number of brands or wine ranges available and so does not have the large market leaders that other FMCG categories have; ‘there are no wine brands in the top 10 alcohol drinks’ (Huisman 2003, p. 50). The 2004 the top advertising spend for a range of drink products in the UK is shown in table 2.1.

Whilst advertising campaigns tend to be rotated through different wines in different years only
one of the annual wine advertising expenditures shown in the Drinks Pocket Book 2006, (ACNielsen, 2005, p. 149) between 2001 and 2004 passed £2million. Low marketing budgets are often cited as a reason for the lack of brand dominance within the wine market. As Julian Brind, senior wine buyer for the Waitrose chain, acknowledged

\[ \text{brands sell and make money, which means that they have more money for promotion, which means that they sell more and make more money. It's a never ending circle.} \]

(Brind, quoted in Aufenast 2002, p. 25)

The difficulty is being able to set up a budget which is large enough to start up a major advertising campaign; generally it is only the large international organisations, who produce mass marketed wine, who have the size to do this, organisations such as Diageo PLC who own Blossom Hill, or Pernod Ricard UK Ltd who own the UK distribution rights to Jacob's Creek.

<table>
<thead>
<tr>
<th>Main Media Advertising Expenditure on Light Wines (£000)</th>
<th>2002</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gallo</td>
<td>486</td>
<td>1,245</td>
</tr>
<tr>
<td>Bordeaux Wines</td>
<td>837</td>
<td>1,044</td>
</tr>
<tr>
<td>Kumala</td>
<td>907</td>
<td>783</td>
</tr>
<tr>
<td>Freixenet</td>
<td>1,480</td>
<td>609</td>
</tr>
<tr>
<td>Cotes du Rhone</td>
<td>279</td>
<td>587</td>
</tr>
<tr>
<td>Arniston Bay</td>
<td>334</td>
<td>370</td>
</tr>
<tr>
<td>Vin de Pays</td>
<td>277</td>
<td>367</td>
</tr>
<tr>
<td>Jacob's Creek</td>
<td>443</td>
<td>356</td>
</tr>
<tr>
<td>Rivercrest</td>
<td>-</td>
<td>311</td>
</tr>
<tr>
<td>Black Tower</td>
<td>257</td>
<td>267</td>
</tr>
</tbody>
</table>

Table 2.2: Main Media Advertising Expenditure on Light Wines (£000), 2002 – 2003; adapted from Key Note Ltd 2004, p. 49
Since many marketing budgets are small many of the largest advertising budgets are those of the generic bodies. As table 2.2 shows three of the largest wine advertisers in 2002 and 2003 were generic wine bodies. Chaney (2000) whilst confirming that the spend on advertising for wine is very low in the UK highlights a paradox about wine sales and advertising:

the advertising sales ratio for wine is half that of other alcoholic beverages....
Paradoxically consumption has been rising while the advertising ration has been decreasing.

(Chaney 2000a, p. 12)

Hoffmann (2004) confirms that this paradox is a world wide trend:

Current marketing trends suggest that, although some markets benefit from advertising, Australian [wine] buyers in this study place very little emphasis on it.

(Hoffmann 2004, p. 88)

Hoffman was discussing advertising as a whole but his work does illuminate the point that the relationship between advertising and wine consumption is not well understood. This paradox, that consumption is rising whilst less is being written about wine in the UK was also discussed by several of the wine journalists.

2.5.2.1. TV Advertising versus Sponsorship

All other types of drink spend well over the amount spent on wine advertising (see tables 2.1 and 2.2) and can therefore afford the more expensive and influential forms of advertising such as TV. Halstead (2005) showed that whilst 78% of consumers recalled seeing wine advertising and that magazines, Internet, newspapers and TV were fairly evenly recalled only TV had a significant recall of the name of the wine advertised and a significant purchase-to-reach ratio. However she also noted that the two brands which had the most significant recall, Jacob’s Creek and Tio Pepe both sponsored TV lifestyle programmes rather than taking out conventional advertising space (Halstead 2005, p. 19). In addition Randall (2000) shows that food programmes on TV often contain an element of wine matching, discussion or consumption and they:
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offer tantalizing views of the social and emotional benefits derived from hospitable activities... and provide knowledge of the protocols needed to participate knowledgeably.
(Randall 2000, p. 131)

This would suggest that for the aspirational wine producers TV can be used effectively as a powerful media although not necessarily via straightforward advertising methods.

In his 1990 paper Gluckman had suggested that sponsorship would be a cost effective method of raising a wine’s profile. Several generic wine boards, particularly the Australian wine board, have gone down this route, i.e. the Australian Wine Bureau was one of the sponsors of the 2004 Mitsubishi Motors Badminton Horse Trials. Wine brands which have used this method of marketing include Jacob’s Creek who is the sponsor for ‘Friends’, the American sit-com on Channel 4/E4 as well as wine supplier to the Rugby World Cup in 2003, and Blossom Hill who is the program sponsor for ‘Will and Grace’ on Channel 4, (Key Notes Ltd, 2004).

2.5.3. Types of Promotion and their Effectiveness.

Rink (1998) suggested that since brands have a very low penetration rate in the UK in comparison to other FMCGs perhaps the most important factor in the use and development of brands is familiarity with the brand, i.e. having tasted and liked it, and reinforcement once usage is established. Rink also suggests that:

current claimed brand usage was found to correlate negatively with advertising and promotion awareness, therefore awareness did not lead to brand usage... Managers should take this as an indication that promotion and distribution are extremely important, as brands must be very widely available and promoted in store, in order to obtain trial.

(Rink, 1998, p. 47)

Chaney (2000a) and Wine Intelligence (2002) confirm that shelf edge labelling and point of sales information are important merchandising technique and one of the most often cited forms of ‘advertising used’ by consumers. Lockshin (2004b) showed:

that about 40% of [the] regular drinkers are high involvement; they think about wine, they read about it and talk about it. This means that 60% of regular wine drinking
Australian consumers (and an even greater percentage in the US and UK) think little about the wines they drink and do not seek information. (Lockshin 2004b, p.32)

This statement, confirmed by others such as Joseph (1999), raises two points: one, why market wine at all; two, if marketing takes place then it has to be to two different types of wine consumer. Previous discussion has confirmed that there are consumers who are interested, and have a high involvement with wine and others who have a very low involvement and just consume it. In response to the first point Balasubramanyam and Salisu (1994) showed that:

advertising and brands save consumers valuable time and effort in their search for quality and chosen attributes in a product.

(Balasubramanyam and Salisu, 1994, p. 67-68),

As previously discussed this is particularly true for less involved consumers, who tend to consume mass consumption wines. It is also these consumers who are most likely to be tempted by various types of promotions.

2.5.3.1. Price Promotions

The most common types of promotions, in the off-trade, are price promotions, Buy One, Get One Free (BOGOF), three for £10, or straightforward price reductions; price promotions are uncommon in the on-trade, unless house wine is included in the cost of a meal. However Stimpfig (2002) and Muir (2005) show that 'most sales promotions never ever break even', (Muir 2005, p. 17).

Commenting about why companies agree to run sales promotions Cheesman (2005) describes how companies, especially multiple grocery chains use wine promotions to encourage consumers into the retail outlet, 'wine is used more and more as a 'cross-the-road' category – a battleground – by the retailers' (Cheesman 2005, p. 17), but as Macadam (2005) points out:

even though incessant sales promotions, especially very deep ones, ... cause damage to brand equity... the reality is if you don't do it, there are four or five people who are willing to do it waiting outside.

(Macadam 2005, p. 18)
As the multiple grocery chains have a very powerful negotiating position with their suppliers, introductory deals are very significant in the adoption of new products by the chains. Furthermore, as Beverland and Lindgreen (2002) highlight:

\[\text{while many retailers felt compelled to carry the brand [a market leader], they had little attachment to the brand, and therefore used it as a loss leader.}\]

(Beverland and Lindgreen, 2002, p. 225)

This is not the market or image that the wine producer had created it for. This creates a tension between the producer and the retailer in which power lies with the retailer. Gluckman confirms that 'large retail groups delisting products not selling in their area' (Gluckman, 1990, p. 30), is normal practice and if a price promotion is what will move the wine then that is what is required to get it listed. It is acknowledged that these price promotions have created a type of consumer who buys on price alone.

James Halliday, Australian wine columnists and senior wine competition judge (quoted in Thompson 2003, p. 53), states that 'it is pointless to promote and price cut endlessly as this drives the brand and the category down' to the point that currently 66% of 'marketing goes on below-line-activity' and suggests that this situation is not permanently sustainable. Anon (2002) suggests that Australian wine producers should reduce dependence upon the UK market and develop other international markets. Were this to happen and the below-the-line price promotions stop this would be likely to effect the buying (and consuming) behaviour of all wine consumers, particularly low involvement consumers.

2.5.3.2. Competition Winning Wines

One other promotional technique has also been written about by academic researchers, and that is the use of wine competitions. Peattie (1995), Orth and Krska (2001) and Lockshin (2004a) show how winning a medal at a wine competition can increase both the sales of wine and the perceived value of that wine. Information about competition winners can be communicated to
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consumers via write-ups in specialist or lifestyle magazines, write-ups on an appropriate internet site, actual ‘medals’ on the bottle and via point of sale information. As Rand (2006) and Manjon (2006) point out though, partly through fashion, partly through improvements in technology and partly because of climate change wines themselves are changing. One effect of this is increased alcohol levels which whilst it makes wine stand out at wine competitions because of the fatter richer texture it may have caused consumers to believe that these flavours are the way wine ‘should’ taste. However wine makers themselves consider these wines to be out of balance for many normal consumption situations and so the attributes of wine which win competitions may at the same time be detrimental to repeat purchases and product adoption.

2.5.4. The Media as an Influence upon Purchase and Consumption

Kalaitzandonakes et al (2004) state that:

"assessing the impact of media coverage on consumer purchasing behaviour is empirically complex. Media coverage is dynamic and can shift over time as new knowledge develops or unpredictable events occur. The relationship of media coverage and consumer perceptions is also complex and difficult to assess."  
(Kalaitzandonakes et al 2004, p. 1240)

Louw (2001) confirms that for all journalists the news or information that they present to the world is always their vision:

"the outcome of whatever set of practices, work routines and discourses journalists have been socialised into accepting."

(Louw 2001, p.160)

What is written about and how it is written is the journalist’s perception of importance and reality, not necessarily as the same reality would be perceived by others.

The paradox in wine journalism is that whilst media coverage across the board, national newspapers, weekend lifestyle sections, TV etc., has reduced consumption has risen (Joseph, 1999; Chaney, 2002a: Allen, 2003: Hibberd, 2005). This paradox is further compounded since Kalaitzandonakes et al (2004) suggest that
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with less than 2% of the US population now engaged in agricultural production, the average food [and drink] consumer has diminishing personal experience and knowledge of agriculture.

(Kalaitzandonakes et al 2004, p. 1238)

They suggest that lack of first hand knowledge is one reason why consumers need to rely upon the media to provide them with relevant information about agricultural products such as wine. The reduced column space orientated to wine as part of lifestyle might help to explain why consumers still retain the image of wine as a natural crafted product and Lockshin (2004a) shows that technical descriptors on wine labels are the ones most likely to decrease impulse to purchase. In the UK detailed technical information is only provided in the specialist press, such as Decanter, Wine and Harpers, or on home websites, read or accessed by small numbers of high involvement consumers consciously involved in the discovery of wine.

Joseph (1999), Lambert (1999) and Murphy (2003) suggest that the real value of detailed technical articles in specialist press is so that trade wine buyers can read about wines which are made by wineries which are too small to have dedicated PR services. The trade wine buyer can then seek out directly wine which could enable them to provide differentiation within their range from their competitors. Chaney (2000b, UK on UK study) shows that in order for wines to be reviewed they need to use 'more innovative adjectives' (p. 480) confirming Murphy's (2003) view that wines need to be re-mystified. Whether this process makes it easier or not for consumers to understand the language of wine is discussed later on in this chapter.

One effect of the reduction in column inches is that many wine journalists believe that this has resulted in different types of wine journalists. Gluck (2003) describes them as Top-Enders and Bottom-Enders.

The Bottom-Enders begin on the lees...Such writers' focus is on the minutiae of the wine, the vineyard, the variety of grapes, the philosophy of the wine grower. Such writers on wine are social animals before anything else: romantics, storytellers, fabulists.

(Gluck 2003, p. 109)
The Top-Ender looks at, smells, and tastes the wine, at that moment in time, without regard to the venue and 'all these sensations are studied and written up [in situ] as the impression the wine has left is mulled over' (Gluck 2003, p. 110). He is suggesting that there are those wine writers for whom wine is a passion and a way of life, whilst for other wine writers it is an object which they can study and write about dispassionately. The two types of writers produce different kinds of writing, i.e. Bottom-Enders are more likely to write books, often well respected reference books, as well as newspaper columns, whilst Top-Enders are more likely to write straightforward technical descriptions which may well form part of a newspaper or magazine article.

A third type of ‘journalist’ is also identified; the wine writers who expect to have all information and wine samples sent to them before they will write about it (Lambert, 1999). This leads to another type of wine column, often found in newspapers and lifestyle magazines, where the ‘journalist’ rewrites / reproduces the publicity material and produces a wine column usually described as a ‘shopping list’ style and containing information only from companies large enough to have a PR department.

2.5.5. A Marketing Paradox

Wine is a tactile object, and can be an object of mass consumption, aspiration or cultural capital. There is overlap between different cultural groups as to if and when wine moves from one category to another. The marketing budgets for wine are small in comparison with all other Fast Moving Consumer Good (FMCG) categories. All of this has to be taken into consideration when reviewing how wine is presented in the media and what types of marketing strategies are in fact suitable for this type of product. So whilst many academic writers highlight individuality of wine and the cultural and social capital of the wine industry despite the low level of consumption of aspirational wines, many others constantly recommend wine producers to
develop overt brands as their main marketing strategy even though this could damage their image and desirability amongst high involvement consumers.

2.6. Labels

Research by Mintel (2001), Halstead (2002) and Wine Intelligence (2002) shows that consumers themselves are unable to identify exactly what makes a good label, although there was a consensus that a ‘traditional’ looking bottle would contain higher quality wine whilst ‘jokey’ bottles and labels would indicate lower quality wines. Gordon (2001), Williams (2001) and Lechmere (2005) all confirm that traditional means quality, which means a higher price; there is discordance with the message if a traditional ‘quality’ style label is used on a cheap bottle of wine. They also raise the point that if the wine is not for the consumers’ own private consumption then one part of the purchasing process will be to assess the bottle in terms of ‘what is this wine going to say about me?’ (Lechmere 2005, p. 72), how will it be perceived by others, what would it look like on a dining table. As Danesi (1999) discusses an image depends for its effect upon a certain way of seeing and the effect is always embedded in particular cultural practices: the words and images used on labels or in bottle shapes, or description in wine lists are always perceived subjectively and positive connotations are situation dependant.

Whilst writers such as Lockshin (2004a) have recommended techniques, such as choosing a pronounceable name, using positive trigger words, an image which has positive connotations world wide, or using colours with positive connotations etc., the cultural, emotional and financial state of the consumer at the moment of purchase will finally dictate the actual purchase.
2.7. Internet Purchasing

Quinton and Harridge-March (2003, UK on UK study) considered the use that various wine retailers make of the internet to improve and expand sales. As their results show it was not necessarily those channels which would have been expected which performed the best or the worst. They identified that the multiple grocery chains paradoxically, whilst having a ‘desire to maintain customers for their mainstream offering’ (Quinton and Harridge-March 2003, p 359) were not able to maintain a consistent or integrated on-line offer, this was despite the:

considerable resources available to these retailers in terms of data warehousing and manipulation....The strongest strategic Internet Players were all specialist [wine] providers with long-standing experience and recognised expertise in their chosen product range. No multi-outlet retail establishment was included in the top scorers. This cluster comprised one-site bricks and mortar retailers who would be considered very traditional, exclusive providers.

(Quinton and Harridge-March 2003, p. 359-360)

Purely on-line providers had, as was expected at the start of the study, user friendly and informative sites. What was less obvious at the start of the study was that the traditional and exclusive off-licences would also score well. However they traditionally had a very good understanding of their customer base built on a one to one knowledge and this methodology, their in-depth knowledge of their consumer is what made the sites the most accessible.

2.8. Summary of the Wine Trades’ Concerns

As can be seen in this chapter one of the most significant issues for the wine trade is the impact of New World wines upon more traditional wines and markets and the consequences this may have both upon themselves and their current and future consumers. This leads directly into considerations of the price quality relationship; how consumers use price to indicate quality and what influences their choice of price for use in particular environments or for particular occasions. The use, by supermarkets in particular, of promotions is also a significant issue with many wine producers being worried about profit margins and also about the potential damage to
the image of wine if it becomes perceived as a low value object always available on promotion somewhere.

As a result of the development of large international organisations each owning many different brands of wine, another current issue is the role of brands. Should brands be developed into enormous homogeneous brands in the same way as coca cola is as the world brand leader for soft fizzy drinks, or should the wine market seek to retain its aspirational, cultural connotations via the use of non-brands and economies of scope? The wine trade is also interested in what role marketing and advertising play in this relationship and how consumers are influenced by the media. This interest is because of the need to continuously develop new markets and or sell more wine. This then leads onto another current topic, labels. The very simple question ‘what is a good label’ has almost holy grail like connotations since the label has great significant in impulse and first purchases but a ‘good’ label is a very subjective idea. There is also interest in how the internet is developing as a retail environment and how it is likely to develop in the future with a new generation of computer literate consumers.

Chapter three looks at wine consumption from a theoretical perspective and it will be seen that the issues that the wine trade has do not always correlate with those of academia.
Chapter Three
Literature Review – The Theoretical Perspective

3.1 Introduction

3.2 Wine Consumer Behaviour and Academic Literature
   3.2.1 Postmodernism and Consumer Culture
   3.2.2 Social Class Impacts upon Wine Usage
   3.2.3 Why Food but not Wine Research?
   3.2.4 Wine Tourism
   3.2.5 Environmental Perceptions
   3.2.6 Qualitative Research into Fine and Mass Consumption Wines

3.3 The Development of the UK Wine Consumer

3.4 Perceived Risk Levels in Purchasing and Consuming Wine
   3.4.1 High and Low Involvement Wine Consumers
   3.4.2 Who Actually Buys, Men or Women?
   3.4.3 Wine Consumption Occasion and Location
   3.4.4 Wine Tasting

3.5 Labels: Their Language, Symbols and Signs

3.6 Summary of the Literature Reviews
3.1. Introduction

This chapter will review literature on the behaviour of wine consumers and other related topics. As will be seen there is very little academic literature either about the consumption of wine in the UK or about UK wine consumers. However there are studies on consumer behaviour in general, some of which can be applied to wine consumption, and there has been a significant amount of research done in the new wine world, especially Australia, in relation to their wine consumers; some of this work is relevant to the UK wine consumer.

Lockshin et al’s (2001) study of global wine retailing, based on Australia and France, originally posited that involvement in wine consumption would transcend nationality and enable particular market segments with similar purchase and consumption behaviours to be identified internationally; however it concluded that ‘retail choices are intrinsically based on consumers’ national backgrounds’ (Lockshin et al, 2001, p. 224). They found that the ability to buy was different in these two and other countries primarily because of national government legislation and cultural differences. Since they also concluded that national cultural habitus would create different wine buying and consumption behaviours this would suggest that wine related behaviours identified in other cultures cannot be attributed uncritically, if at all, to the UK wine consumer and visa versa.

Since the majority of academic literature written about wine consumers is written from the Australian perspective on the behaviour of Australian and or New Zealand consumers only those wine related consumer behaviour papers which are not written from this stance will be identified as such and their perspective given.
As with chapter two, the areas which are discussed in this chapter are those where academic research exists. The result of this is that the issues do not always link one to another causing the structure of the chapter to be disjointed, however the lack of cohesion serves to illustrate the gaps in current knowledge which this thesis addresses via its primary data collection.

3.2. Wine Consumer Behaviour and Academic Literature

3.2.1. Postmodernism and Consumer Culture

Pierre Bourdieu although not the first, see Immanual Kant and Georg Simmel for example, has been perhaps the most influential theorist in relation to consumer behaviour in the postmodern world through of his identification of four types of capital (economic, social, symbolic, cultural) and how social groups use that capital to define themselves and include or exclude others. Bourdieu (1977) also defined the notion of habitus; that is to say, that the acquisition and consumption of culture are ingrained in the human consciousness through the historical development of individual and collective practices. Bourdieu’s (1977) main area of study was the new petit bourgeoise or newly developing middle class in France and the differing social groups and their dynamics of consumption within it, (Gronow, 1997). He was amongst the first to identify how wine, amongst other objects, can be used to demonstrate various elitist consumption behaviours (Fowler, 1997).

A key contribution of Bourdieu was his questioning of the value of a modernist epistemological approach to the study of social sciences (Acciaioli, 2000). His view was that this approach did not take account of existent cultural dogma which situated all research both in time and culture. It is Bourdieu’s identification of how our acquisition of capital and processes of consumption is used by ourselves and others to identify ourselves that makes his work so important to this study and its philosophical stance. As Brown (1993, p. 50) argues ‘the urge to consume is a characteristic, perhaps the characteristic symptom, of the postmodern condition.’
The postmodern approach as discussed by Crotty (2003) is a view of our current world stance on life. It is generally considered to have started or ‘arrived’ as a movement or a social science theory during the 1960s but is not an easy or exact theoretical perspective to pin down and as Filmer et al suggest:

the very search for a single, unifying model of social and cultural life may be inappropriate. The notion of researchers pursuing a variety of genres ... may be more appropriate.

(Filmer et al 2000, p. 21)

The postmodern movement, as its name might suggest, is not a straightforward rejection of the past of modernism because there is much overlap between the two. Many of the exemplars of modernism particularly the constructionalists such as Henry James and Theodor W. Adorno were also positing themes such as ambiguity and culture in the late nineteenth and early twentieth century which are now taken as granted within postmodernism. Modernism had within it this sense of place or function, but was also based on:

an aesthetic self consciousness and reflexiveness: a rejection of narrative structure in favour of simultaneity and montage; an exploration of the paradoxical, ambiguous and uncertain open-ended nature of reality; and a rejection of the notion of an integrated personality in favour of an emphasis upon the de-structured, de-humanised subject.

(Featherstone 1998, p. 7)

This is particularly so in relation to art where there was a distinction between ‘high’ aesthetic, self-conscious modern art and the simultaneous development of universally available mass culture. However since the Second World War as Crotty points out:

[all kinds of divisions and distinctions are evaporating within the world in the face of mass media, mass marketing, mass capitalism, mass commodification, mass entertainment, rapid transport systems and the rest, to the extent of calling into question even the distinction between the virtual and the real.

(Crotty 2003, p. 194)

Thus whilst postmodernism originates in the world of art with postmodern art forms following on from and in reaction to modern art it then moved into ‘architecture, the visual and performing arts and music in the 1970s’ (Featherstone 1998, p. 7) and has now come to be associated with interpretation of culture in its broadest and deepest sense.
One of the core components of postmodernism is its study of the disparate cultures which make up society, the who, the how and the why of them. It is not about creating new knowledge indeed some would suggest that the entire purpose of postmodernism is that of deconstruction of theory but I suggest that it is also the reconstruction or in this thesis the construction of knowledge and the making of that knowledge available throughout society that is the relevant element of postmodernism.

From a wine point of view this component of postmodernism, the construction and dissemination of that constructed knowledge, is important. This is because there is little understanding about consumer behaviour in relation to wine usage despite the fact that wine is accepted to be both an object of mass consumption and a fine art object, (in the acquisition of esoteric knowledge about wine). It is also, has been historically in the UK culture (see chapter one) and still is in some European cultures just a necessary physical object, to live you must both drink and eat. As Charters (2002) and Hoffman (2004) concur wine is used by most cultural groups; the purpose of this thesis is to establish in what ways.

3.2.2. Social Class Impacts upon Wine Usage

Capitalism, classically defined by Marx, is traditionally understood to mean that as we live in a capitalist society we react towards that capitalism either reactively if part of one of the dominated societal groups or proactively if part of one of the dominant groups. Many academics would concur that one of the differences between modernism and postmodernism is that to the science and logic of the capitalist cycle of modernism, postmodernism has added the consideration of culture to the equation. Butler and Savage (1995) show there are social groups, made up of professionals, managers, administrators, intellectuals and academics who fill in the middle ground between the dominant elite and dominated working class, the middle classes. Goldthorpe (1982), Featherstone (1998) and Urry (1998) postulate that the rapid expansion of
these middle classes for various economic reasons, as well as the broadening of the demographic definition of middle class, means that they have ‘borrowed’ or acquired members from other social classes. This does not mean that the class system would be deconstructed but rather that even though the new middle classes are not a homogeneous group they will still act in ways, described by Bourdieu for example, to defend those privileges which they have acquired and more specifically they will use symbolic capital to do so. Urry (1998) defines these middle classes as those:

whose occupants (1) do not own capital or land to any substantial degree; (2) are located within a set of interlocking social institutions which collectively ‘service’ capital; (3) enjoy superior work and market situations generally resulting from the existence of well defined career, either within or between organisations; and (4) have their entry regulated by the differential possession of educational credentials.

(Urry 1998, p. 89)

Featherstone (1998) and Urry (1998) highlight the movement by people particularly those in the fractured middle classes to express and define themselves by their cultural and symbolic capital, their use of their education, income and leisure time. Ritzer (2001) comments that:

the mass chain stores are so readily accessible, convenient and attractive that even the elites shop in them. The result is that the elite, wherever they may be, are also increasingly likely to consume in the same settings and purchase many of the same things [as the non-elite]. Thus elites find it more difficult to distinguish themselves.

(Ritzer 2001, p. 219)

Savage et al, (1992) suggest that because of this increasing mass commodification, those seeking to distinguish themselves, whilst they can be conspicuous in their inconspicuousness (Ritzer, 2001), i.e. they can afford the Gucci bag, but choose to buy the replica, will tend to use culture and cultural capital as a tool for demonstrating their superiority continuously reinventing a new taste or competing system of classifications and distinctions.

Warde and Tomlinson (1995) make the point that it is often women who have moved up a social class or fraction, and may well define their class position by that of their husband or partner. They suggest that:
it is women who express and sustain class related differences through visible and interpretable consumption patterns.

(Warde and Tomlinson 1995, p. 252)

and it is women who still take on the role of most of the household shopping. Savage et al (1992, UK on UK study) highlight differing occasions when different types of alcohol are used to demonstrate symbolic and cultural capital within different social groups, i.e. the traditional use of champagne and port with all their associated rituals by older social groups and their deliberate informalisation by young middle class male groups. Bailey (1999, UK on UK study) established that wine consumption is seen especially by young people as a middle class activity.

Goldthorpe (1982) identified aspirational aspects of the middle classes which suggest the possibility of differing behaviours in relation to wine. Academics such as Amerine and Roessler (1976) and Fretter (1971) consider fine wine as a high art form and for those seeking to acquire an exclusive culture it might be one of the high art forms accessible to a large number of aspirational consumers. Like books wine above the mass consumption level is not expensive, unlike opera tickets or an original painting and it may be that wine like cheese, (see Christy and Norris, 1999, UK on UK study), is being used by some consumers as a way of expressing their inclusion in their class or social grouping and excluding others. Christy and Norris (1999) show that cheese has many similarities to wine as consumer goods. It can be used as both a basic household commodity found in almost every household fridge and yet via specialist shops and farm markets it can also have aspirational qualities where the consumer actively seeks out traditional, authentic, new cheeses, which they can afford to buy and which they can then discuss and consume with their friends. Ravenscroft and van Westering’s (2000, UK on UK study) research reinforces Christy and Norris’s views and show how important the aspect of discovery and reflecting upon that discovery is to this cultural viewpoint. Seymour’s (2004, p. 14, pan-European stance) study points out that some may only use wine as a cultural symbol in public and then if uncomfortable with the situation revert ‘to the tastes and practices of original
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class habitus when in private’, suggesting that wine is consumed in more than one way within social groups.

Bourdieu (1977) in his description of culture used the idea of fine wine as well as art and literature to illustrate consumer behaviours which demonstrate culture or more particularly the cultural code that attaches a symbolic value to the cultural practise of each social group. Bourdieu did not discuss mass production (consumption) wine even though he discussed ‘high’ and ‘low’ art and literature. This is likely to be for two reasons; one that the UK conception of mass market wines is Australian wine (see chapter two). These wines were not exported to France as a mass commodity product when Bourdieu was developing his theories and so were not able to be written about. The second reason is that it is also quite likely that as a Frenchman of his own time he was also a victim of his own habitus, in that, just as he did not initially see women, 50% of the population, as having a specific impact with culture (Fowler, 1997) it was not seen by him that the common beverage, wine, was anything other than a common beverage, and safer than water to drink.

That does not alter Bourdieu’s importance to this thesis since his definitions of capital can be applied to the current UK wine market. Wine rarely has a true economic capital, since if it is bought for its rarity value it cannot be consumed, because if it is there is no object and so no economic value. If it is kept too long it will, like any other agricultural product, eventually go off and then it will also have no value as a wine object (although it may have cultural value as an historical object). However if that rare and scarce wine is purchased and then consumed publicly it can be used to demonstrate and reinforce social capital, some being included in the group to consume, others being excluded. Symbolic capital would be demonstrated because the other participants were honoured / respected enough to be honoured with an invitation to consume; and cultural capital because the owner knew what and how to buy and how to demonstrate consumption.
The purchase, gifting or discussion of any wine can demonstrate some or all of these attributes within different social structures. Groves et al's (2000) adaptation of Holt's taxonomy of consumption practices, see table 3.1, can be used to demonstrate many social, economic and cultural aspects of capital, for instance the experience of choosing a wine as opposed to the acquisition and display of knowledge about wine. The taxonomy also relates to behaviours demonstrated by some in the consumer focus groups.

<table>
<thead>
<tr>
<th>Structure of Consumption</th>
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<tr>
<td>Object actions</td>
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<td>Experience</td>
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<td>Interpersonal actions</td>
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<td>Communing</td>
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<td>Through actions</td>
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Fowler (1997) and Swartz (2000) discuss Bourdieu’s theory about the importance of language as an element of the cultural inclusion / exclusion dominance process. Specifically they discuss how the French school system, and its inclusion of specific cultural knowledge, including language, is used as part of the power of the intelligentsia, to reinforce their concept of culture. This concept can be applied to other school or national educational systems: if the pursuit of fine wine is a high art culture, then the language used by the UK trade bodies, e.g. the WSET, trade wine buyers and wine writers demonstrates this dominant behaviour. Full-time students at UWIC taught by the author and others in the department and given no signage to describe the smell or taste of wine often use contemporary objects such as tippex or new trainers, to identify the smell. For those taking internationally recognised exams they then have to learn the ‘correct’ industry standard discourse as well as their own sign. The acquisition of this language adds directly to the student’s symbolic and cultural capital but suggests inertia and an inability to understand / include others in these elite groups. Whilst elite groups often want to be
exclusive in this instance these groups purport to be in a constant dialogue with the general public wanting to develop new consumer bases.

As Bourdieu (1977) showed we all bring our past habits, the way we were taught as children, our familial and life experiences with us unconsciously for the most part into any situation in which we find ourselves and we view and react to the situation as a direct result of our habitus upon ourselves. This does not mean that a child from a dominated class need remain in that class but that it is likely to do so and will develop a rationale to explain this dominance. For example, as Beardsworth and Keil (1997) show in their study of food and society, meat is the most important symbolic object of the meal for the working class; only fools or snobs pay 'more for the wine than the chicken for dinner' (MCG5), thus these consumers rationalise the good sense they demonstrated by buying a cheap bottle of wine rather than an expensive one.

Charters (2004) discusses the symbolic capital wine knowledge can create in his thesis on understanding wine quality; Wright et al (2000, p. 436) discuss cultural capital, the repression of a sweet tooth in the 'interests of social acceptance and acquiring culture capital', as perhaps partly explaining the decline of sweet wines such as Liebfraumilch and certainly explaining the development of pale cream sherry, a sweet wine that looks like a dry one.

Butler and Savage (1995) and Urry (1998) amongst others agreed with Bourdieu in suggesting that that the rapidly expanded middle classes are composed of various social fractions. Some moving down from the elite and some from previous middle class generations will have wine related cultural knowledge; others will aspire to it; and still others will have decided it's not for them, (Bruwer et al's (2002) basic wine drinker, see table 3.2). Statistical reports such as Mintel and Key Note Ltd show that wine is consumed by all demographic groups. Therefore all social classes, the elite, the middle and the working class consume wine but with differing
levels of involvement ranging from very low to the pursuit of the ‘art’ of wine. As Douglas (1982) argues, because of the rituals associated with alcohol consumption:

\[ \text{to the consumers themselves, consumption is less like a pleasure for its own sake and more like a pleasurable fulfilment of social duties.} \]

(Douglas 1982, p. 16)

Consumption for most is not the pursuit of continuously seeking out the new but perhaps better described in alcohol and wine terms as enjoying the ‘traditional’; a pint in the pub, granny’s Christmas sherry, champagne for celebrations, wine with meals out, etc. and the slow evolution of new rituals of consumption; conversely most current academic research is based upon the art of wine, (Ritzer, 2001; Charters, 2002; Beverland, 2004)

3.2.3. Why Food but Not Wine Research?

Thompson and Vourachis (1995) state that:

\[ \text{eating and drinking are often considered to be habitual behaviours of such low involvement that they are not much influenced by what others think we should do} \]

(Thompson and Vourachis 1995, p. 49)

Korsmeyer (2005) referring to food, suggests that taste is ‘often relegated to the status of a lower sense’ (Korsmeyer 2005, p. 5) because it is relatively inarticulate in comparison to sight and sound and therefore not considered suitable by some for academic study. Yet there is much research to show that food, or at least ‘culinary culture’ (Ferguson 2000, p. 207), plays a significant role in habitus such as the work of Telfer (1996), Bell and Valentine (1997), Gronow (1997), Williams (2002) and Beardsworth and Keil (2000), as well as Bourdieu. All of these writers show that food consumption is not just about the physiological need to eat but that a culinary culture develops because of what you eat, where, with whom and utilising what rituals which identifies social groups and helps to form national identity.

Bourdieu identified food as a cultural marker used by people to classify themselves and Gronow (1997) suggests that consumption of both food and drink, particularly public consumption, are
vital parts of the socialisation of all social groups especially within the middle class. As Bell and Valentine (1997) show food often has a regional basis, and certainly up until the 1960s when travel, a higher disposable income and immigration introduced the bulk of the UK population to other foods, food still could be used to define habitus quite reliably; there still often is a nostalgia for home cooking, mother’s or granny’s. Unlike France and many other European countries however, there is no native and little inherited wine culture for most social groups in the UK. The UK does not produce any significant amount of wine. Whilst pre the 1970s and 1980s the elite may have consumed wine (usually French, aspiring to the classical greats of Bordeaux or Burgundy, vintage port, or champagne) there is no regional culture of wine in the UK as there is for food; water, tea or beer were the common accompaniments to food, and for many they still are along with soft drinks.

Wine as a mass consumption object was introduced into the UK a few years after the UK began to develop its ‘international’ food tastes. This lack of embedded culture may be one reason why so little is written about wine consumption in the UK and the UK wine consumer in comparison to the large amount of literature available on food and its usage; capital, symbolic and cultural needs time, often generational time, to acquire.

3.2.4. Wine Tourism

One area where there is a large body of work emerging is in the area of wine tourism. Tourism is one of the uses of cultural leisure time and whilst there are only a few current studies which look specifically at other cultural aspects and usages of wine, there are several studies, both UK and internationally based, which look at the development of wine tourism. O’Neill et al (2002), Hall et al, (2000) (international overview) and unpublished studies by Ravenscroft and van Westering (2000, UK on UK study) and Simpson et al (2004) all show how wine tourists use wine; the seeking out; the sensual aspects; the language; and the history as part of their lifestyle
to define themselves and their social status. In the Australian and New Zealand studies, visits and short stay breaks to wineries are a core part of demonstrating social status. Simpson et al (2004) and Brown and Getz (2005) discuss the extent to which the vineyard and going back to nature all play a part in this cultural acquisition; (note, the return to nature, naturalism, is one of the features of the postmodern movement). However Carlsen, (2004) in his review of global wine tourism raises two points. One point is the dualism of wine tourism, how can the production orientation of the wine industry and the service orientation of wine tourism be integrated especially when considering that:

*the many factors that motivate wine tourists and indeed wineries, and wine regions is yet to be fully understood.*

(Carlsen 2004, p. 10)

The other point is that, whilst those seeking to gain cultural capital from fine wine knowledge may be sought after consumers, how does the winery separate them from the ‘*mobile drunk*’ seeking intoxication [and free alcohol] *rather than education*’ (Carlsen 2004, p. 6) because the mass or binge consumer is also part of the wine consuming market.

### 3.2.5. Environmental Perceptions

Spawton (1991a) suggested that an important factor in the marketing of wine is the aesthetic and experiential image of wine and vineyards as rural, natural places and this has become one of the key themes of wine tourism. It has also been suggested by some writers that this is part of the reason for wine being adopted so strongly by women in the home facilitating increased domestic consumption by men. Pugh and Fletcher (2002) certainly suggest that the ‘greening’ of wine, the promotion of environmentally friendly wines, can increase purchase potential within some, if not all, social groups and the signs and symbols used to promote wine often stress the ‘naturalness’ of wine, even in mass produced, standardised products, for instance Banrock Station.
3.2.6. Qualitative Research into Fine and Mass Consumption Wines

Bourdieu uses fine wine, via its cost, language, and consumption rituals to illustrate his theories; wine tourism in its most usual form is about fine wines; writers such Beverland (2004) tend to write mainly about the consumers and market segments for fine wines although he does point out that some products perceived as luxury items are in fact mass produced, a classic wine example being Moet et Chandon champagne. Spawton suggested that there are in fact two wines, beverage and fine wines, but that ‘the beverage wine consumers of the 1970s are now the fine wine buyers of the 1990s’ (Spawton 1991a, p12) although without any empirical evidence to back up this suggested evolution leading to two questions: how does he know this and what is a fine wine?

Spawton is not the only academic to identify that there is more than one type of wine; at its most simplistic wine is either an everyday drink or something to seek out for special occasions. Charters (2004), Charters and Pettigrew (2002) and Beverland (2004) all discuss the existence of both markets. However none address the concept of when wine becomes ‘fine’ and whose perception makes it so nor what is the difference between basic, premium and fine, therefore they do not ask if these perceptions matter, are they common to one or all consuming groups; does this matter and if so to whom?

There is no doubt that basic everyday mass consumption wine exists: in the UK the average bottle price off-trade is £3.75p (Key Note Ltd 2004, p13, figure 5.2) which means much is purchased for less. There is also no doubt that fine wine costing several hundreds of UK pounds also exists but in a world where above £5.00 is expensive for a bottle of wine for some people (MGC5) at one end and Michael Winner considers that paying £100 for corkage can be good value (Winner, 2003) there must be an overlap. It is this lower and middle ground suggested by the trade wine buyers, wine producers and Mintel (2005) to be below £8 in the UK
that is so poorly researched and understood yet it is where most of the active UK wine buying and consuming population inhabit. At its upper end it may also be the area where most profit is made. Charters states that:

*beverage wine...receives little attention from the wine industry.... [and]... almost no attention from wine critics and writers.*

(Charters 2002, p 522)

Magazines such as Decanter and Wine and Spirit International are, obviously, written with the aspirational, discovery and or fine wine drinker in mind. The remit of the weekend columnist, lifestyle guru rather than wine informer was discussed in chapter two.

Given that fine wine is by definition only a small and elitist market, it is quite remarkable how little research into the culture behind the mass consumption of everyday wines there is. Charters (2004) and Charters and Pettigrew's (2002) work on the markers that different social groups use to identify quality and so differentiate between wines are examples of the few studies available which discuss the full range of wines and who might consume them. Ritzer (2001) suggests that this may be, particularly in America, because consumption especially of mass production objects (therefore low cultural value) is seen as less academic, low status and more trivial than investigating other perhaps more traditional subjects. Charters (2002), seems to agree with this when he points out that the Australian mass produced wines are:

*from warm to hot climactic conditions with high yields and less vintage variation, [and] tends to be perceived by wine experts as less intense and possibly less complex ... beverage wine, therefore offers less in the way of aesthetic stimulation.*

(Charters 2002, p. 530)

It may also be simply because as a fairly new phenomenon, the boom in mass consumption wines started in the UK in the late 1970s (Jenster and Jenster, 1993: NTC Publications Ltd, 2000), no one has yet thought to look at it; perhaps, as suggested earlier in this chapter, there has not been enough time to reflect back onto our own adoption of this new culture.
As can be seen in table 3.2 Johnson and Bruwer (2004) identify five different wine consumer types and Bruwer et al (2002) identify five different wine consumer market segments but, apart from the basic wine drinker, the five segments identified are not the same in both papers even where the same name is given to a cluster.

<table>
<thead>
<tr>
<th>Wine Consumer Types</th>
<th>Australian Market Research</th>
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<tbody>
<tr>
<td>Conservative Knowledgeable Wine Drinkers</td>
<td>Basic Wine Drinkers</td>
</tr>
<tr>
<td>Image-orientated, Knowledge-seeking Wine Drinkers</td>
<td>Purposeful Inconspicuous Premium Wine Drinkers</td>
</tr>
<tr>
<td>Basic wine Drinkers</td>
<td>Ritual Orientated Conspicuous Wine Enthusiasts</td>
</tr>
<tr>
<td>Experimenting Highly Knowledgeable Wine Drinkers</td>
<td>Fashion / Image Orientated Wine Drinkers</td>
</tr>
<tr>
<td>Enjoyment-orientated Social Wine Drinkers</td>
<td>Enjoyment Orientated Social Wine Drinkers</td>
</tr>
<tr>
<td>Johnson and Bruwer, 2004</td>
<td>Bruwer et al, 2002</td>
</tr>
</tbody>
</table>

Table 3.2. Identification of Australian Wine Consumer Types from Johnson and Bruwer (2004) and Bruwer et al (2002).

This supports the contention that establishing wine purchase and consumption culture is complex and fluid and therefore difficult to definitively identify. This is a point reinforced by the work of Mudie et al (2003) which confirms the difficulties of accurately establishing the evidence of emotional input into the purchase and use of hospitality services (i.e. food and drink) especially where there is little tangible product in the overall consumption occasion, as when consuming wine in on-trade premises.

Spawton (1991a) was one of the first to try to understand the wine consumer; to try to define different types of consumers and to identify different market segments. His work is still frequently cited in international research today. Spawton listed what he considered to be the:

*the key ingredients of marketing information needed for decision making in the wine industry.*

(Spawton 1991a, p.10)

He suggested the when, how and what that should be asked about consumers but never asks the qualitative question why. Thus Spawton was very much concerned with the purchasing behaviour of the consumer rather than what motivated the purchase and based his market segments upon purchase behaviour alone. This method of perceiving the consumer has
continued and is exemplified in the work of Quester and Smart (1996) amongst others even though they confirm that general demographic details do not seem to be useful in identifying ‘purchase behaviour in wine consumers’ (Quester and Smart 1996, p. 44), although age and income may have some effect. In their 2002 study Bruwer et al explored this point further and considered that:

as wine increasingly becomes a lifestyle beverage and more acceptable and desired by a wider spectrum of consumers there is a greater need to understand consumer values, consumption patterns as reflected in their lifestyle profiles. ... demographics provide a great deal of personal detail about the consumer, but give no pointers to the underlying motivations that drive the consumer's behaviour.

(Bruwer et al 2002, p. 221)

In 1999 Unwin discussed the limited amount of qualitative research available and commented that there is rather too much:

research designed to understand the actual processes by which consumers opt to pay particular prices for specific bottles of wine. ... Rather than seeking to develop ever more nuanced hedonic price models, more research effort could be devoted to ... furthering our understanding of [consumer] behaviour in different cultural contexts.

(Unwin 1999, p. 103)

Charters (2002) and Thomas and Pickering (2003a) are still making the same points and recommended that consumer behaviour in the context of the full range of wines and consumption contexts be further investigated but using ‘qualitative’ research methods. Despite this, a review of the papers presented at the 12th Australian Wine Industry Technical Conference in 2004 shows that 75% of the papers presented in the only session out of eleven to be concerned specifically with consumers, ‘Defining Wine Composition to Meet Consumer Preference’ were quantitative, suggesting that there is still more quantitative that qualitative research being produced. Ritzer (2001) suggests that consumer behaviour research is dominated by process models particularly in the USA possibly because it facilitates publication better than qualitative research.
3.3. The Development of the UK Wine Consumer

There are two papers quoted frequently in much of the literature about wine consumption, usually about non UK wine consumers. One Spawton’s (1991a) paper Market Planning for Wine, (Australia on Europe) has been previously mentioned: the other is Mitchell and Greatorex’s (1989) study, Risk Reducing Strategies Used in the Purchase of Wine in the UK, (UK on UK study). I believe that their continued uncritical use is an example of the reification prevalent throughout the wine industry; that these papers are not necessarily either current or fully applicable to the UK wine consumer market but are constantly referred to as such, despite their age, because there has been so little qualitative work carried out on the UK wine consumer.

It is accepted that the product ‘Mass Consumption Wines Made in New World Countries’ appeared in the UK and the (wine) New World during the 1970s and 1980s (Jenster and Jenster, 1993). Both the above papers referred to as recently as Demossier (2004) are now fifteen to eighteen years old, in fact as old as it takes to grow a new legal wine consumer generation in the UK. Without in any way decrying the groundbreaking work done in both studies when they were done the current formation of the UK wine market was perhaps ten to fifteen years old, now it’s twenty five to thirty years old. In child like terms it was a baby about one or one and a half years old and now it’s about three. When it was one or one and a half it was not sure what a grape was, and certainly not sure if it liked it but if the mummy person said yummy it would try it. Now that the baby is three it knows what a grape is; it knows whether it likes them or not; it knows when it wants to eat one; and it doesn’t always believe the mummy person when she says yummy. No one disputes that when a small child doubles in age it has learnt and developed a phenomenal amount, and maybe will never learn so much so quickly again, so it is curious that wine writers and researchers seem to assume that the UK and perhaps other metaphorical wine consuming babies have not grown up when logically they may now be in the process of imparting their knowledge and culture in well established ways described by many authoritative
writers and sociologists to their own children (Bourdieu, 1977; Beardsworth and Keil, 1997; Rozin and Rozin, 2005).

It was undoubtedly correct to say in 1991 in reference to the Australian wine consumer that as naïve ‘baby like’ consumers the world appeared full of risks which had to be reduced:

> with the exception of a small expert connoisseurs segment of the market the majority of wine purchasers are highly risk sensitive and their wine purchase behaviour is governed by factors that influence behaviour and the risk reduction strategies adopted during the purchase process.


However if the theories of Bourdieu and others are accepted, that symbolic and cultural capital are passed from one generation to another so that behaviour becomes inculcated and habitual, it is unlikely that wine per se would retain the same level of unfamiliarity and risk as it originally possessed. It may be that the early risk reducing strategies identified to deal with it are no longer applicable and that the perceptions of risk currently held by most trade wine buyers and some academics are examples of reification developing, a point that would seem to be confirmed by the Waverly Group’s research into UK consumers’ buying habits as discussed by Williams (2003).

> The decision to buy wine of some sort will have been made before the consumer reaches the store, ... More than half (52%) of buyers will also have a colour, region, country or brand in mind before they pick up their trolley or basket ...41.9% of buyers say that they pick up their wine 'in no time at all' and 62% of buyers will take no longer than a minute to find what they want.

(Williams 2003a, p. 11)

These conclusions are supported by The Vinexpo Studies, (2003), which show that most wine is bought for consumption at home with or without a meal and that:

> three quarters of respondents say that they feel comfortable and confident when buying wine to drink at home

(The Vinexpo Studies 2003, p. 7)

This research would indicate that most consumers do not perceive a significant risk factor when buying wine particularly in supermarkets. Mitchell and Greatorex themselves noted that whilst risk at many social and physical levels exists:
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far from reducing risk, some consumers actively increase the amount of risk they need to handle, especially under conditions of low perceived risk.

(Mitchell and Greatorex 1989, p. 36)

Moving from £3.99 to £5.99, for example, may be a low perceived risk for many consumers and as Mintel (2002) discusses many consumers automatically trade up, experiment, at the weekend. It may be that this weekend home drinking trade up is where aspirational and discovery wine consumers start their cultural journeys.

3.4. Perceived Risk Levels in Purchasing and Consuming Wine

There is contradictory information in the literature available re the level of anxiety felt by UK wine consumers both in their purchasing habits and consumption situation. As discussed there are writers currently publishing studies leaning heavily on the work of Spawton (1991a) and Mitchell and Greatorex, (1989) especially in relation to the concept of risk, i.e. Egan and Bell (2002), Demossier, (2004) and Johnson and Bruwer (2004). The risks that they perceive may still be real they may also be a manifestation of the newly forming social networks and social relationships that Beck (1982) identified as methods of self identification in an increasingly mobile society but which are no longer seen as risk or significant risk because of generational learning. Acquisition of wine knowledge may now be perceived more as a form of social identity or marker and reification may be being perpetuated by academics as they refer to literature which is no longer relevant, or it may be that levels of risk as perceived by consumers are situation dependant and not always a source of stress.

Mitchell and Greatorex (1989) discussed risk and the risk reduction strategies that wine consumers used to support the purchase of wine. They identified four areas of risk, functional, financial, social and physical.

Functional risk pertains to the use to which wine is put i.e. is it palatable?... Social risk is the face lost if the wine fails to be satisfactory... Physical risk translates as being the effects of a hangover or the chemicals such as sulphur dioxide which is used as a preservative... Financial risk is the amount of money paid for a bottle of wine.
Some of these risks may no longer apply, or may no longer be as straightforward as their original description. With the advent of New World, mass consumption wine styles the functional risk of buying an off wine or unfamiliar style has been significantly reduced. Technical advancements in wine making have also reduced the likelihood of chemical contamination, reducing one of the physical risks identified by Mitchell and Greatorex (1989) and their speculation that consumers may stop drinking alcohol for health reasons is unlikely in the light of current academic study which tends to confirm that wine consumed in moderation is good for the health: these same medical studies, and trade research such as Elhrlich et al (2002, UK on UK study) confirmed that wine is not the alcoholic drink of choice for those going out to get drunk. Social and financial risk as concepts are accepted to be still relevant, but are now identified as complex behaviours, challenging Mitchell and Greatorex’s (1989, p. 42) research results since they concluded that ‘it is not so important where a wine is being sold as which wine is being sold’: social and financial risk at home are seen as minimal in comparison to social or financial risk in other public situations; the place of consumption and rationale for that consumption are important. Hall et al (2001) confirm the complexity of wine consumption in on-trade situations, and that place and occasion are important. When trying to reduce risk in on-trade situations Mitchell and Greatorex’s (1989) observation that wine waiters and sales assistants were ‘not rated highly by consumers’, (p. 42) would still appear to be a current phenomena with The Vinexpo Studies, (2003, p. 7) confirming that ‘only 1 in 3 ask for advice in a retail setting’.

However in contrast to Mitchell and Greatorex (1989) who concluded that brand development would increase because it reduced risk in certain groups, The Vinexpo Studies also show that:

\textit{two thirds of the sample would rather try something new than stick with their usual wine purchase [and] 71\% do not stick to well known brands when purchasing wine.}

(The Vinexpo Studies 2003, p. 7)
Chaney (2000a UK on UK study) discusses the fact that consumers are brand promiscuous and that names such as Bordeaux and Chardonnay are considered to be synonyms for brands by many consumers. ACNielsen (2005) shows that the top five brands only have 34% of the off-trade market combined indicating that brand penetration has not grown in the way posited by Mitchel and Greatorex (1989) however it also shows that the top five brands have a much higher penetration rate of 70% in the on-trade, particularly pubs, where much less experimentation takes place. Whilst this is not high in comparison to other FMCGs it does suggest that brands do give reassurance to certain groups of consumers in some on-trade environments.

A final point is made by Olsen et al (2003) (a USA based study) in their recent study investigating consumer self confidence in wine related situations. They identify that there is a group of consumers who ‘may not necessarily know a lot about wine, but are not worried about the consequences of poor selection’, they have very little anxiety. Bruwer et al (2002) identify ‘Purposeful, Inconspicuous Premium Wine Drinkers (p. 236), as 25% of their study group. Whilst this group are drinking quality wines, they worry very little about fashion or image and so confirm Olsen et al’s view that there are those who consume wine and have very little anxiety about this activity again suggesting that social and financial risk are not universally perceived but are personal, situational and occasion based.

**3.4.1. High and Low Involvement Wine Consumers**

Christy and Norris (1999) and Ravenscroft and Van Westering (2000) may be accurate in suggesting that for some groups the ‘risk’ is perceived as part of the game of discovery and it is the discovery, the route to discovery which is key to their behaviour, an extrovert, confident participative culture and not the introverted one of risk avoidance highlighted by earlier writers when general wine consumption in the UK was in its infancy. This would be in agreement with
Johnson and Bruwer (2004) who discuss risk reduction strategies used by different groups of people, the use of ‘safe’ known wine brands, by the less involved and the activity of independent research by the highly involved and motivated. This point introduces one of the major paradoxes for the wine trade if novice consumers like brands to help reduce risk:

the premium wine consumer has the confidence to consider a huge range of wines when purchasing. This makes it very hard for brands to hold onto customers, and the bigger the brand gets the harder it becomes, because its boutique image suffers ... and it is no longer a discovery item. So premium brands leak consumers to non-brands.

(Gluck 2001, p. 51)

Goldsmith and d’Hauteville (1998) show that heavily involved consumers, both consume more, and are the wine innovators. Dodd (1997) in his paper on the adoption of New World wine products in the USA, specifically Texas, points out that the:

innovator desires to try the wine rather than rely on the advice of friends and relatives, is likely to be more knowledgeable about wine in general than the non-innovator, and trusts his or her own judgement concerning a new product. Innovators rely more on impersonal external sources of information. This is because sources of information such as word-of-mouth are not available until the product has already been diffused through the social system.

(Dodd 1997, p. 129)

Dodd confirms Gatignon and Robertson’s (1991) view that ‘new product innovators ...are drawn from frequent uses of that product category’. (Dodd 1997, p. 130). Lockshin et al (2001) suggest that heavily involved wine consumers are displaying enduring involvement where the product category, wine, has produced a lasting interest: is a hobby for the consumer. They also point out that these consumers use more speciality stores and spend above average amounts in them. Beverland (2004) suggests that these are the consumers who are most interested in the luxury end of the market but that a luxury wine does not necessarily mean an iconic wine, this view is confirmed by observations made by the consumer focus groups in chapter eight.

3.4.2. Who Actually Buys, Men or Women?

Purchase and consumption are affected by the level of involvement with an object and gender studies such at that of Savage et al (2001) show that not only do the different fractions of the
middle classes have differing consumption habits, but also that within households men and
women ‘tend to engage in different activities’, (Savage et al 2001, p. 546). They show that
whilst these differences tend to be complementary it may be that men and women are unable to
engage in the same activities because of differing time constraints, i.e. childcare versus work
constraints, Cockburn-Wootten (2002) suggests that they may also perceive their participation
in the same activity differently. For example, Cockburn-Wootten (2002) shows that in
heterosexual households grocery shopping with the family is seen as a leisure activity by men
whilst for women it is a mandatory functional task.

Within wine purchase and consumption activities Quester and Smart’s (1996) study showed
that, according to the Australian Bureau of Statistics, more women than men purchased wine.
However, in a follow up study by Hoffmann (2004) more qualitative research administered at
wineries showed that significantly more men were likely to buy at the winery than women. This
behaviour was repeated in Mitchell and Hall’s (2004) work and although more men bought
wine at the winery more women bought the same wine in other places, such as supermarkets,
after the visit. In Thomas and Pickering’s (2003a) study there was a slightly higher response
rate from men than women overall, 53% against 47%, but in the mailing list respondents 70%
were men. This plus Vinexpo’s (2001) findings confirm that there are different stimuli for men
and women to purchase and perhaps consume wine which are as yet unidentified:

\[ \text{men apparently are more confident about all matters vinous and have a far stronger wine} \]
\[ \text{buff tendency[than women].} \]

(Williams 2003b, p. 10)

3.4.3. Wine Consumption Occasion and Location

As well as gender the wine consumption occasion affects both purchase and consumption
(Johnson and Bruwer, 2004: Lockshin and Kahrmanis, 1998) and friendly knowledgeable staff
in retail outlets was highlighted by both as a significant influencer on purchase.
Hall et al (2001) discuss the importance of staff and staff understanding of the consumer and the occasion for consumption in on-trade premises. They identify five common dining occasions, i.e. business versus social, to demonstrate how the different facets of wine change with the different rationale for the dining occasion, and how actual or perceived negative or positive effects / consequences of wine choice affect the consumers' behaviour, and repeat behaviour.

3.4.4. Wine Tasting

Johnson and Bruwer (2004) consider that tasting is the one area that all consumers say would increase their confidence to buy new wines, a behaviour also identified in most risk and discovery studies. Whilst these authors positively recommend this strategy to retailers across the board it has to be queried as to how realistic this is for all on and off-trade environments not to mention mail order and internet purchasing. Goode (2005) also queries the value of one off tastings per se, since the situation is not a normal consumption situation. Peynaud (2005) agrees with Professor Tim Payne, of University College London, quoted in Goode that:

> it is actually quite unlikely that, in any real case, the physical and psychological conditions of any two tasters are the same

(Goode 2005, p. 26)

This suggests that as the situation is false, dependant upon the perception, mood and public pressure of the consumer at the moment they taste they may be more or less predisposed to like the wine but their view when they drink the same wine in a different setting may well be very different, and possibly include disappointment. Goode concludes that:

> It is clear that the perception of flavour is a complicated business and in this complexity there is plenty of room for inter- and intra-individual differences ... the wine trade should be paying closer attention to these perceptual differences because they are highly relevant to the production, selling and critical assessment of wine.

(Goode 2005, p. 26)

Gluckman (1990) confirms that consumer:

> behaviour is more likely to be influenced by a product tasting if the tasting is experienced in an environment in which the consumer can relate to the other elements contributing to the wine experience, e.g. at a party, social gathering or dinner.

(Gluckman 1990, p. 42)
This suggests therefore that whilst there is consensus that tasting is an excellent way to reduce risk and encourage purchasing, creating an appropriate environment for tasting is of key importance.

3.5. Labels: Their Language, Symbols and Signs

Language, symbols and signs have all been included in this section on labels because consumers have emotive reactions, and monitor their feelings when making judgements about what to purchase (Pham et al, 2001). It may be that the language used on the label, whilst it must be appropriate to the potential purchaser (Thompson and Vourachis, 1995) is of less significance than the visual impact of the whole image (colour and bottle shape, impact upon of family and friends) in the initial purchase. For example in the pilot focus group one member consistently rejected several bottles as likely to contain low quality wine. When they were placed together it was noticed that they were all Bordeaux style bottles, the focus group participant then stated that she never buys wine if it’s in that shape bottle but that this was the first time she had consciously realised that bottle shape denoted quality of wine more significantly for her than anything written on the label.

Barthe’s (1973) illustration of a black soldier saluting the French flag is often used to show the distinction between denotation and connotation or the levels of meaning that can be contained within a single image and how different observers understand that image. In his discussions on myth he points out that one of the three major referent systems is nature and naturalness and tradition are often used in wine language and advertising even for mass produced, standardised wine. Barthe’s illustration exemplifies how one object, in his case a poster, can contain different levels of meaning: image (of self, other and the object) and language are all always an integral part of a wine bottle and its purchase.
This view is supported by Thomas and Pickering, (2003b, p. 70) who show that ‘bottle colour and bottle shape’ whilst not actually part of the labelling has an impact upon some consumers and Lesschaeve (2002) confirms that:

> the perceived quality of a wine is determined by many factors. Image elements such as bottle shape, front label, and back label information impart some sensory and hedonic expectations on the wine to the consumer will taste once the bottle is opened. If the wine style corresponds to what was expected, the consumer should be satisfied and it is likely that he/she will repurchase this bottle again. In contrast, disappointment may affect the repurchase behaviour.

(Lesschaeve 2002, p. 59)

However as Aitchison (1999) discusses a successful descriptor or simile term used in one culture may be of little use in another; fruit and flowers are often used as metaphoric descriptors in Europe, Australia New Zealand and the USA, but are of little use in countries where these products are either unknown or have a different cultural significance. Lesschaeve (2002) and Goode (2005) both confirm that even expert tasters are unlikely to come up with the same description of the same wine tasted at the same time in the same environment. Lesschaeve (2002) shows how this occurs if the tasters come from different technical back grounds, winemakers as opposed to wine marketers, and Goode (2005) concurs with Aitchison (1999) and Peynaud (2005) that:

> the range of words used are different for each author; and tasters possess a specific vocabulary for preferred and non-preferred wines.

(Goode 2005, p. 25)

All of this is without taking into account the tasters’ psychological state at the time of consumption or their habitus. Gluck (2003) discusses the difficulty of using language to describe a taste sensation in a meaningful way so that it has the same connotations intended by the author for a variety of recipients. He discusses the use of metaphors and prototypes and considers the difficulty in using these conventions. Aitchison (1999) suggests that the use of the word gooseberries is a misleading prototype, in wine terminology, because it has been used so often to describe Sauvignon Blanc that they have almost become synonymous. Gluck (2003) whilst agreeing with Aitchison in principle that many wine terms have become bleached...
metaphors suggests that the problem of description occurs because many New Zealand Sauvignon Blancs and Sancerres actually do taste of gooseberries, therefore this is an accurate descriptor and not a metaphor. A similar problem also arises with prototypes, many wines are described as having similar qualities to a Burgundy or a Medoc, but the writer who uses these terms is often referring in memory to an older vintage and style that they enjoyed in their past, whilst the reader may well be considering the term with reference to a much younger style of wine that they are familiar with.

Brochet and Dubourdieu’s (2001) research confirms this use of prototypes in wine description language and suggest that:

*what a writer does in front of a wine is not an analysis of its separate sensory properties but a comparison of all of the cognitive associations he or she has from the wine (color, initial aroma, and taste) with the impressions he or she has already experienced when tasting other wines. When the taster speaks of a specific wine describing flavors, he or she mainly uses a series of words he or she has mainly used for this category of wine and is not describing the specific wine.*

(Brochet and Dubourdieu 2001, p. 192)

They also suggest that the terms used as descriptors may have been learned or constructed to suit the opinion of the taster. This supports an issue raised earlier in this chapter that the teaching of or learning about wine includes the learning of a particular language which is prototypical and not analytical and where each individual has their own discourse strategy which they do not share with others unless they too had initially learnt the same prototype discourse, thus the dominant discourse of the wine knowledgeable excludes the non-informed. In wine labelling terms this confirms the difficulty, discussed earlier in this section, of ensuring that the wine knowledgeable signifier and the recipient, who is probably not wine knowledgeable, perceive that same meaning in a single description.

Charters et al (1999) showed that even those knowledgeable about wine were unlikely to be able to match wine label descriptions to a specific wine in a blind tasting. They further
speculate that key words which encourage a positive response in consumers, as identified in their work and that of others such as Thomas and Pickering (2003b) and Brochet and Dubourdieu (2001), could be used by an unscrupulous marketer to as key words on a label which would attract a consumer to purchase but which actually bore very little resemblance to the wine being consumed, a practice to some extent recommended by Chaney (2000b) and Murphy (2003) if the wines are to attract the attention of trade wine buyers.

3.6. Summary of the Literature Reviews

Having comprehensively reviewed the literature which is available relating to the wine market within the UK and the UK wine consumer in this and the previous chapter it is not possible to identify a complete body of work or understanding of UK wine consumer behaviour. There are three distinct types of literature / secondary data available; statistical reports, articles published in the trade magazines and academic research. Chapter two showed that issues for the wine trade are all related to the maintenance of profit margins and the development of new markets, covering the development of new wine styles, world oversupply leading to unsustainable profit margins, the need to develop new / a future generation of wine consumers and the physical and tactile qualities of wine, such as label quality perceptions and image. This business / marketing orientation was expected however it had also been anticipated that there would have been some interest in and discussion of consumer behaviour motivation.

The academic literature contained a wealth of knowledge relating to consumer behaviour highlighting the importance of habitus and culture to our behaviour. It was possible to show the importance of food or culinary culture to social and national culture but there was little work on how wine is used in this context despite the fact that wine very often accompanies food in public dining situations. Research at the luxury end of the wine market and into wine tourism
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shows that there are distinctive forms of wine related consumer behaviour which can be identified, although most of these studies do not relate specifically to the UK wine consumer.

Whilst some researchers (Ritzer, 2001: Charters, 2002: Thomas and Pickering, 2003a) have highlighted this lack of qualitative research many others such as Lockshin (2004b) refute the need for it and continue to refer to work that is no longer uncritically relevant (Mitchell and Greatorex, 1989: Spawton, 1991). This chapter suggests that it may be that the lack of qualitative research is because of the relatively recent development of wine as an integral part of the UK consumption culture. It may also be as Hall et al (2001) and Ritzer (2001) suggest because public wine consumption is considered either too difficult or too low status to be studied.

None of these are good enough reasons for not investigating how and why wine is used by the UK wine consuming population, instead this serves to illustrate the point made in the Introduction that as the world’s most financially significant wine market the UK wine consumer should be identified and understood. This thesis intends to construct relevant theory which will enable the identification of the UK wine consumer and show how their behaviour integrates into the study of consumer behaviour as a whole. As this chapter has shown it is likely that wine related behaviour is influenced by involvement with wine, gender, occasion and image and these themes along with those highlighted in chapters two and three will be investigated in the research into the four stakeholder groups, the trade wine buyers, the wine producing companies, the wine media and wine consumers.
Chapter Four

Methodology

4.1 Introduction

As demonstrated in the literature review postmodernism has been very important in developing social sciences and the notion of culture and consumer behaviour. A few practitioners, such as Bourdieu, have also explicitly used wine and wine usage to develop behavioural theories. It might be expected therefore that this thesis would be written from a purely postmodern stance since:

\[ \text{the researcher comes to the fore in postmodern research with the recognition that no methodology is capable of achieving an unmediated objective representation of the facts.} \]

(Johnson and Duderley 2000, p. 108)

However the philosophical perspective and data collection methodologies used throughout this thesis are based upon the need to reflect upon and interpret the complex sedimented layers of information made available to the author during the research process; an approach which does not lend itself to a straightforward positivist stance anymore than it does to a postmodern one.

In this thesis, primary data has been collected from four different sets of people each of whom have their own language and interpretation of the reality of their and the other three group’s experiences with regard to wine. Members of three groups, the trade wine buyers, the wine media personalities and the wine producers are also members of the fourth group wine consumers even if they were not interviewed in that capacity. I am also a member of the wine consumer group.
4.2. Philosophical Stance

I am a member of one stakeholder group, that of the consumer, and whilst I have been influenced by the other three groups as a wine purchaser and consumer I had little premeditated knowledge of how I had been influenced at the start of the research progress; my knowledge and understanding grew as the research process progressed. I did not have any significant knowledge of the internal processes of the other stakeholder groups at the start of the research process nor was there any realistic way to become a participant in those groups. Therefore it was realised very early on in the research process that this thesis would have both objective and subjective, positive and reflexive elements to it.

4.2.1 Epistemological Perspective

A postmodern epistemology would be predicated upon the belief that knowledge is constructed through language, (Crotty, 1998: Seale, 1999: Patton, 2002), that each different community has its own interpretation of the knowledge that language delivers to them so that it is impossible to accurately represent single truths. It assumes that there are as many realities as there are communities and that knowledge or theories can be endlessly deconstructed so that truth or objectivity will always be a relative not absolute position. This could lead to an ontonologically subjective stance which would then not allow that the knowledge generated by the four stakeholder groups studied in this thesis could create a consensus of knowledge which would help to explain the phenomenon of wine usage in the UK or be of use to those working in the wine trade. It is also a perspective which does not sit comfortably with the statistical, quantitative, data which is available, generated by bodies such as Mintel, Key Note Ltd, Customs and Excise and discussed in the literature review.

The research process was viewed as an iterative, inductive process during which the gathering of knowledge from one study would enhance the gathering of knowledge for the next enabling a conceptual framework to be developed grounded in each stakeholder group’s interpretation of their and other’s behaviour and supported by quantitative data when available.

Therefore the study took a constructionist approach using a pragmatic critical realist perspective which assumes that ‘we are all complicit in the processes through which we socially construct versions of reality’ (Johnson and Duberley 2000, p. 173). This approach allows a range of methodologies based in the discipline of ethnography and including grounded theory and autoethnography to be used as appropriate to each stakeholder group: as Henn et al (2006) show
a multi-strategy approach is considered a legitimate technique within qualitative research since it enables the researcher to draw on different types of data and by interpreting it from different perspective produce a more solid explanation of phenomena identified. By interpreting the experienced reality of each stakeholder group it is intended that legitimate knowledge and understanding of the UK wine consumer will be developed based upon the consensus of these democratic social groups.

4.2.2. Methodologies Utilised

4.2.2.1. Grounded Theory

The pragmatic critical realist position is based upon the assumption that whilst new knowledge can be engendered this knowledge is always likely to become the object of future reflexive investigation (Johnson and Duberley, 2000). This thesis utilises a grounded theory methodology since the moderate purchase and consumption of wine in the UK is an area of consumer behaviour where little research has been done and an exploratory stance, where all the stakeholder groups are included, will help construct UK wine consumer behavioural theory. A grounded theory approach:

means that researchers enter into data collection with the supposition that it will be an open ended and flexible process that will likely be modified over the course of the study

(Locke 2001, p. 55)

Both Locke (2001) and Crotty (2003) discuss the point that whilst grounded theory as originally proposed by Glaser and Strauss (1967) in The Discovery of Grounded Theory could be said to take an objective stance, later studies by both these authors and others could be said to have taken a subjective stance, to have taken ‘on the language associated with interpretivism’ (Locke 2001, p. 12), neither of which viewpoint is consistent with the epistemology of this study. Patton notes that:

the terms objectivity and subjectivity have become ideological ammunition in the methodological paradigms debate

(Patton 2002, p. 50 / 51)

and recommends using neither term. Crotty suggests that it is better to use the term constructionism in relation to grounded theory since:

we do not create meaning. We construct meaning. We have something to work with. What we have to work with is the world and objects in the world.

(Crotty 2003, p. 43-44)

In fact Strauss himself (Strauss and Corbin, 1994) remarks that:

many people still get their conceptions of grounded theory from the original book, and have missed the later more realistic and balanced modifications of that book’s purposeful rhetoric.
This suggests, therefore, that as grounded theory has been utilised it has evolved and the later evolutions of the theory are more multi-layered and less inductively orientated than the original proposition of the theory. ‘Grounded theory focuses on the process of generating theory’ (Patton 2002, p. 125) and one of its more valuable attributes:

*is its ability to generate basic concepts, thereby providing the stepping stones necessary to develop and update a disciplinary body of knowledge.*

(Corbin and Holt 2005, p. 51)

As this thesis is going to develop a new area of knowledge it is anticipated that as the market and the consumer evolve so the research theory will need to evolve along-side it.

Strauss and Corbin, (1994) Patton (2002) and Locke (2001) discuss a criticism of grounded theory that can be and is made; the issue of the criticalness and theory generation of some grounded theory studies. Critical praxis, the analytical linking of reflection and action, is demonstrated throughout this research because of the reflexive iterative process of examining each series of data collection at the end of the each of the four studies; construing the (possible) themes identified in that study; reviewing the actual make up of the interviewees for the next study and the themes just identified and moderating the next set of data collection appropriately. The themes which emerge will form the substantive theory which this thesis will generate.

### 4.2.2.2. Autoethnological Stance

Since I am considered to be an expert in the field of wine knowledge, and am employed as such, it could be argued that a purely autoethnological methodology would have been the most suitable methodology to use since:

*in autoethnography, then, you use your own experiences to garner insights into the larger culture or subculture of which you are a part.*

(Patton 2002, p. 86)

However as previously stated I am only a full participant in one of the stakeholder groups, that of the wine consumer, and even within that group as an expert I could not be said to be truly representative of it.
Whilst many authors recognise that we are all part of the social world (Behar, 1996, Husler, 2005) the question is how far the author’s voice interprets or filters the voices of the participants:

_what prior knowledge did the researcher bring to the research topic?_ and _how has it enhanced or detracted from the data gathering and analysis?_ (Patton 2002, p. 566)

Autoethnography allows the voice, experiences and beliefs of the author to be overtly included in the research process. It is based upon the concepts of ‘self awareness and self understanding’ (Westwood 2005, p. 11) recognising that as a participating member of the social world our life experiences influence our research.

I am a wine consumer but, by the definitions given later, considered to be an expert within that community; therefore whilst I am a participant in the community I am not an exemplar of the community as a whole but only for a small part of it. Whilst not having worked in the wine trade recently, I have senior professional qualifications. These enable me as a lecturer within a school of hospitality, to teach wine based studies from evening classes to dissertation level; in order for the students to pass nationally recognised exams I pass on trade rote and possibly reification whilst questioning the validity of current industry based paradigms. Conversely as a year tutor and a dissertation tutor I supervise students who have no interest in the subject of wine at all. I also have a large family whose views on wine cover an enormous and grounding range;

- from an aged and recently widowed aunt, with reduced sight and polio impaired movement
  _‘well you know your uncle used to buy all our wine, can you help me now?’_ The wine has to be easily openable, ‘reasonably’ priced and taste like it did in memory 60 plus years ago;
- a sister _‘yes I know that I drink the wine but [real ale drinking husband] knows what I like and buys it for me so don’t ask me what it is’_
• from a non-drinking non-British partner 'if you teach me about wine then I'll be able to join in conversations with you, [partner] and your friends better';

and at the other end of the range

• from another sister 'did you know that the new Charlie Metcalfe vintage is in?'

• from a brother 'I've found a new Berry Brothers outlet near where I live, I'll take you there next time you visit.'

I have also worked with the local police, as part of my lecturing responsibilities, on alcohol misuse programmes such as TASC, (Targeting Alcohol related Street Crime), a government sponsored project part of their overall AHRSE strategy. I also interact with a friend who fosters children from alcohol abusive homes. On a lecturer’s salary it is not possible to move into the world described by the trade wine buyer MGC2 where no wine ‘under £9.99’ is ever consumed; like any other hobby participation has to be planned into leisure time and income.

It was therefore felt that that whilst I am involved in the provision of alcohol and specifically wine, I am able to identify when I am actively affecting a situation, when I am observing and when I am a participant and identify the rationale behind each situation. I am confident of my ability to use my professional credibility in order to gain interviews, to express empathy with and use the language of the expert groups, but also of being able to maintain neutrality, observe and listen in other appropriate situations.

Since I am not a member of three of the study groups, trade wine buyers, wine producers and wine media personalities, it was decided that it would be most appropriate to take an autoethnographic approach in relation to the collection and analysis of data from wine consumers and an ethnographical methodology will be used in the data collection and analysis for the other three studies.
4.3. Data Analysis and Validity Issues

Praxis has been essential throughout the collection of data because both knowledge gained and the practical limitations of the research process changed the structure, rationale and or place of data collection throughout the data collection process. This is considered to be a positive step since for any critically reflexive process to remain grounded it must react to and reflect the reality of the knowledge throughout the course of the data collection process (Strauss and Corbin, 1994: Locke, 2001: Corbin and Holt, 2005: Patton, 2002); it was always intended that this thesis would react according to the data and knowledge constructed from its collection rather than try to fit a possible pattern previously identified by existent theories.

4.3.1. Qualitative versus Quantitative Data Collection

The primary data collection for this thesis is based upon qualitative research. Quantitative methods are particularly useful for generating causal laws which have predictive powers and as such are very much favoured by positivist researchers, (Crotty 1998: Johnson and Duberley, 2000: Patton 2002). Generally they take the route of testing a hypothesis within a representative sub-population sample whose results can then be statistically inferred across a whole population.

This approach assumes that there is a hypothesis to be tested. As has previously been discussed there is currently no significant body of knowledge upon which to base a hypothesis therefore qualitative methods were considered to be superior for this thesis. It may be that some of the themes which are developed in this research will form the basis of future hypotheses which could be tested throughout the UK wine consuming population however it is more likely that theory generated will continue to develop as the UK wine consumers’ relationship with wine continues to evolve.
4.3.1.1. Qualitative Data Analysis

Both quantitative and qualitative data were collected during this research process, the vast majority being qualitative. The qualitative data were subjected to open, axial and core coding both using CAQDAS and manually as appropriate to each study. For much of the data, the first three studies, the open and axial coding was done during the research process as a whole since these analyses enabled the themes to be constructed in the next part of the data collection. As Patton (2005) describes this is normal in ethnographic research, if not in quantitative research, because:

the fluid and emergent nature of naturalistic inquiry make the distinction between data gathering and analysis ...less absolute

(Patton, 2005, p. 436)

As Locke (2001) discusses open, axial and core codings were first proposed by Strauss during his development of grounded theory. These concepts have been utilised throughout this research since the majority of the data have been analysed several times and triangulated against the previously construed data as new information was generated. This is similar to the way the de Certeau (1986, p. 146) describes creating his 'stockpile of knowledge'. De Certeau’s ideas/diagrams show a series of loops coming from a home base, returning to the field, and then repeating the process as often as the requirements and practicalities of the research require it, see figure 4.1. Each return of the loop, construction of new knowledge, enables the researcher to travel closer towards the final ‘truth’ although by the very nature of inductive research they are unlikely to ever reach an absolute truth, simply an accurate current representation of it which future research will develop further.
4.3.1.2. Quantitative Data Analysis

The only quantitative data collected was the demographic details of the focus group participants and their actual buying habits. These were collected to place each participant into a social setting as construed by national data bases such as Key Note Ltd and Mintel, to establish if any themes relating to social class or buying habits emerged and to help triangulate the trade wine buyers' speculations with regard to children, shopping and travel. The amount of quantitative data collected this way was small and was not intended to produce statistically significant information. It was used to establish if there might be potential correlations between some of the trade wine buyers, wine producer and wine journalists beliefs about consumer profiles and actual consumer behaviour. The amount of quantitative data collected was small enough to be analysed without the use of a computer programme. Emergent themes, presented and discussed in the results and discussion chapters, suggest that this data might usefully form a base for a future statistically significant study.
4.3.1.3. Computer-Assisted Qualitative Data Analysis

As discussed by Patton (2002) and Fielding (1993) the choice of whether or not to use computer-assisted qualitative data analysis (CAQDAS) programmes to assist with data analysis is up to the individual researcher and a CAQDAS programme is only able to:

facilitate the work of analysis ... analysis programmes speed up the process of locating coded themes, grouping data in categories and comparing pages in transcripts.

(Patton 2002, p. 442)

and in the hands of an inexperienced researcher there is always the possibility that they may be influenced by the implicit theories embedded into the programme and so miss out on some emergent themes or patterns. As Fielding (1993) points out:

those preferring hermeneutic approaches, ethnomethodology conversion analysis or holistic analysis are less well served

(Fielding 1993, p. 2)

by CAQDAS programmes than those using a more positivist approach. In the end the researcher must do the content analysis by themselves and decide what patterns or themes are being constructed from the data; creative, intellectual discipline and rigour comes from the researcher not the analysis programme.

However various CAQDAS programmes were investigated to assist in the data analysis because of the sheer volume of data generated by the twenty seven interviews with the trade wine buyers; as Seale and Kelly (1998) discuss a suitable computer programme can assist with the rapid retrieval of information from an unwieldy mass of transcripts and texts far faster than the traditional method of cutting and physically placing text in masses of appropriate piles. NUD*IST5 was chosen to assist because its indexing structure with its tree-like patterns of development enable the researcher to develop, change and cross tabulate themes with ease and in depth. It was also pragmatically chosen over a programme such as ETHNOGRAPH because there were other researchers using the programme who were able to assist in the learning phase.
and with subsequent problems that emerged. I found the process very positive in the first coding process but after the initial cohort fragmentation analysis and initial themes had been identified the NUD*IST5 programme was found to be very difficult and time consuming to use for axial coding and for triangulating the data across the four studies.

Since the volume of data generated in wine producers, wine journalist and consumer focus groups was much smaller, i.e. three, five and six sets of data to be analysed and the initial themes had already been identified it was not felt that NUD*IST5 style analysis would be of significant use in the rest of the data analysis process. Therefore all of the axial core coding and later triangulation of the trade wine buyer study and all of the data analysis of the wine producer, wine journalist and consumer focus groups was carried out without the use of a CAQDAS programme as such but simply by using the cut and paste facility in Microsoft Word, a practical process which Fielding (1993) confirms is as appropriate as CAQDAS programs when the features and size of the data sample are fairly small.

4.3.2. Establishing Credibility

Credibility in academic terms has two functions (Mason, 1996). One to establish the research itself as credible; that is to say it will demonstrate ‘groundedness’, argue soundly for inclusion in contribution to the body of knowledge relating to consumer behaviour debate, add to critical social theory and show good practice. The other meaning of credibility is the credibility and perception of the researcher themselves to all of the stakeholders from whom they need to collect data and awareness of how they may affect the reliability and the quality of information gained.
4.3.2.1. Credibility of the Research Processes

The credibility of any research process is established in part by ensuring that the entire research process is open to scrutiny and repeatable, (Patton, 2002: Crotty, 2003: Henn, 2006). It is also established by the soundness of the analysis process.

The methods used to collect and analyse the primary data in this thesis are described in detail throughout the rest of this chapter and is therefore potentially replicable by others. During the data gathering process each set of data has been analysed and coded before the next set/s of data was/ were collected and each subsequent collection of data was built upon and reacted to the themes developed in the prior work, this is consistent both with grounded theory (Locke, 2001: Corbin and Holt, 2005) and critical reflexivity (Craig, 2003: Johnson and Durbeley, 2000). To further establish reliability each set of data has also been triangulated with other sets from the initial pilot focus groups right through until the final consumer groups. My expertise has been identified, discussed and used to support this process wherever appropriate.

4.3.2.2. Credibility of the Author

My credibility as the researcher was considered to be paramount to this research study because in many cases there was only one suitable interviewee particularly in terms of those organisations who only had one owner, one head office wine buyer or one European Marketing manager. If I had not been considered credible personally access for these critical interviews might not have been granted. This meant that there was ever only going to be one opportunity to make appropriate contact with many of the people considered to be the significant influencers within their organisation as well as a limited number of organisations and people to contact. Once the significant organisation had been identified it was very simple to identify the significant person; the challenge was to make sure that they agreed to be interviewed.
I established my credibility to the trade wine buyers, wine producers and wine journalists in two ways. The first was via my professional qualifications, which are highly regarded within the trade and the second was via the support of a Master of Wine who assisted in providing names for and assessing the significance of potential interviewees.

4.3.2.3. Access

It was decided to avoid gatekeepers such as personal assistants or secretaries for initial contact as far as possible, partly because their identities were not known and partly because of their filtering function. As Walsh (1998) discusses there may be many reasons for gatekeepers hindering access; their picture of their community, subculture or organisation, their disinterest in what they perceive as mundane matters, their perceived irrelevance of the request.

The wine trade is often perceived by those who don’t work within it as glamorous and many applications for access to significant or public people are made, some of these are spurious and as the trade wine buyers discuss in the results section there are some people they just don’t want to see. The gatekeepers were assumed, therefore, to be likely to be especially vigilant in filtering out what they perceived to be non-business related cold calling.

Since one way of demonstrating personal credibility is inside knowledge the ability to contact the correct person directly was considered to be an essential way of demonstrating professional knowledge, research and researcher credibility. Application in the first three studies was made directly to the potential interviewee personal credibility having been established as previously discussed. This method was deemed successful because there were only two refusals received in the entire research process.
This professional type of credibility was not thought to have any significance for the consumer groups; for them personal knowledge of and trust in the link person was the key. Much time was spent identifying the link people and discussing the content of the proposed focus groups before they were set up.

4.4. Primary Data Collection

Four stakeholder groups were finally identified; three initial ones with wine producing companies being added in later. Each group has its own identity and therefore required its own method of data collection. As previously mentioned in some organisations there was only one suitable interviewee and many participants were interviewed because they were the senior member of their management team or the owner of the business. It was realised that parity across the interviews and confidentiality, which were deemed essential (Seale, 1998: Patton 2002: Babour and Schostak, 2005), could only be maintained via the use of one to one in-depth interviews for the trade wine buyers, wine producing companies and wine media personalities. Since the moderate consumption of wine is usually a social activity to replicate normality, as far as is possible, and enhance the reliability and depth of data collected (Patton, 2002: Babour and Schostak, 2005) focus groups were used to facilitate data collection from consumers.

4.4.1 Evolution of the Primary Data Collection Process

It had originally been theorised that there was a relationship between wines that were written about in various types of media, wines available to buy in various retail outlets and the wines that consumers purchased and consumed (figure 4.2). This research process for this thesis started from the proposition that only wines which were written about were bought - or was it that only wines which were bought were written about? To establish whether or not this was the correct model of influence a series of six pilot consumer focus groups was run, set up using normal snowballing techniques. The topics discussed in these focus groups were generated
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primarily by the conversations I had had with others in my study group and my experiences as a wine consumer and lecturer. Eastern European wines were used as the exemplar because whilst freely available in multiple grocery outlets they received very little attention in the press. There was also a perception by many in the trade that these wines were low price and low quality and should be relegated for sale to the bottom shelf. This perception was initially shared by the focus group participants, but reversed after blind tasting when they were then perceived as having a good to excellent price quality relationship.

![Diagram](image)

Figure 4.2: Initial Theory of Influence in the Purchase and Consumption of Light Wines within the UK

The analysis of the data from these focus groups established that media, publicity *per se*, was not a significant influencer. What was much more significant was the ability to buy and the consumers' cultural heritage plus emotional being at the moment of purchase and or consumption. The research question was therefore modified, see figure 4.3, to reflect the significance of the trade wine buyers, different methods of wine purchase and the social and cultural factors impacting upon the wine consumer.

As the trade wine buyers were the group whose wine consumer culture paradigm had initiated the whole research process and the ability to purchase was established as a significant factor in
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Figure 4.3: Revised Theory of Influence in the Purchase and Consumption of Light Wines within the UK consumers relationships with wine it was decided that the primary data collection would start with this group. Individual in-depth interviews were conducted with twenty seven representatives of various sections of the trade. It was during this series of interviews that the trade wine buyers identified the wine producing companies as potentially significant influencers, this group was then added to the stakeholder groups.

Since most of the largest world wine producers are based in Australia, i.e. Southcorp, or the USA, specifically California, i.e. Gallo, it was anticipated that there would be significant practical difficulties in gaining access to the wine producing companies. However whilst visiting California upon other business I took the opportunity to visit several wine producing companies in situ. Interviews were held with senior members of market research teams at the head offices of organisations with significant presence in the UK market. It rapidly became apparent that these were not the correct people to be interviewing; they had little concept of either who was the potential market for their wine in the USA nor how the UK or world market worked:
I don’t think that we do anything that specific, like make wines for a market... we make the best wines we can and sell them in the markets that seem most receptive... there’s a whole international department that could probably speak to that more than I could... it’s very expensive to do market research and focus groups and we usually need to get a certain level of business in a country that is able to pay back for the focus group that its received

Senior Market Researcher for one of the wine producing companies subsequently interviewed in the UK

These interviewees, who were more concerned with making wine than selling it, suggested that their Heads of Marketing in the UK would be much more logical interviewees and I concurred. In depth interviews were then set up with the most significant marketing person for the largest three organisations selling into the UK currently. The topics for discussion were primarily those raised during the interviews with the trade wine buyers but supplemented by academic research and suggestions from a Master of Wine.

The wine media personalities interviewed were initially identified by the pilot consumer focus group series and the trade wine buyers as significant. Snowballing techniques (d’Cruz and Jones, 2004) were used to identify the final set of interviewees ensuring full representation across all forms of media. Five interviews were conducted. All of the interviews were one to one in-depth interviews and the topics for discussion were primarily those areas raised by the analysis of the trade wine buyers interviews, where themes relevant to media had been identified during the initial open coding process, other topics were identified during the literature search. The pilot consumer focus group series had barely commented upon the media although they had mentioned personalities.

The interviews with the wine media personalities and wine producing organisations were conducted concurrently since most interviewees were based in London and the south east of England and it made sense to do this from a logistical point of view.
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Each interview was recorded and then transcribed as soon as possible after the interview took place. This enabled the first analysis, open coding, of the initial stakeholder group interviewed to be completed so that the subjects for the next two series of interviews could be constructed. When the interviews from the second two stakeholder groups had been completed these new data had their first analysis and several new themes were identified. There were also themes where the interviewees within a stakeholder group or between stakeholder groups raised points of difference within a theme. The themes and points of difference were used to construct the topics for the consumer focus groups, the final study group. The make up of the consumer focus groups was devised by age groups repeatedly highlighted by the trade wine buyers, who frequently said that behaviour “X” belongs to age group “Y” and so on. Since these consumer age groups correlated to quite closely with Mintel demographic statistics it was decide to base the focus group construction upon the groups identified by the trade wine buyers, as it would also enable demographic details to be gathered which could then be compared with national statistics to see if any other trends/ themes could be observed or identified.

Once the full primary data collection was complete a final analysis and triangulation, to establish the core codes and final themes was undertaken and is presented in the results section of this thesis, chapters five to eight, and discussed in chapter nine. The following sections of this chapter describe in full detail the processes involved for each of the four primary data collection studies.

4.4.2. Identification of Stakeholder Groups

4.4.2.1. Trade Wine Buyers

The trade wine buyers were identified as a significant stakeholder group from the start of the research process since if they do not buy the wine from source and make it available to consumers in the UK then the majority of UK consumers will not be able to buy or consume
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wine. Their rationale for specific purchases, prices, promotions and the circumstances under which they make wine available to the consumer were all considered to be potentially significant.

4.4.2.2. Wine Producing Companies

As discussed previously the wine producing companies were identified as potential stakeholders during the data collections process with the trade wine buyers. The trade wine buyers, particularly those based in the head offices of the multiple grocery chains who had direct contact with wine producing companies, commented was that they thought the wine producing companies must, logically, have a rationale for continuing to plant and/or make ever increasing amounts of wine and that given the significant capital investment required and the long lead in time for return on that capital they would have been likely to have had a specific wine market in mind at the star of the process; that wine would have been developed for a previously identified target consumer market.

4.4.2.3. Wine Journalists

These interviewees have been called "wine media personalities" up until now as that is how they were initially thought of but following research the phrase "wine journalist" will now be used: it is considered to better describe their actual function and perception in relation to the trade wine buyers and consumers as all of the interviewees worked in various different media but not all in the general public eye. Wine journalist is simply a short-hand but accurate emotive term since whatever other form of media they worked in they all wrote. As Locke (2001, p. 84) comments when discussing the tensions inherent in the use of grounded theory accurate naming helps to ‘meaningfully conceptualize…data’. Whilst Locke was discussing the importance of naming and perhaps renaming data categories I suggest that it is equally important to give accurate and meaningful names to all the stakeholder groups since the words used:
creates meaning in the mind of the readers or listeners ... Paying close attention to the connotations of signs can give us a tool to explore the multiple meanings which people can attach to words and begin to unpack the secondary meanings which float nebulously around the language we use everyday.

(Parson et al 2005, p. 165-166)

The phrase 'wine media personalities' whilst an accurate and literal meaning does not carry the same cultural imagery as 'wine journalist', the person who writes in the weekend supplements – oh and I also saw them on TV, heard them on the radio etc.

4.4.2.4. Wine Consumers
The term wine consumer can be taken to have several meanings. This thesis is not concerned with excessive, physically damaging or illegitimate consumption of wine. It is concerned with those who legally purchase and consume wine in moderation as a part of their lifestyle as discussed and described by Demossier (2004) and Bourdieu. All of the focus group participants were social wine consumers for whom wine played a greater or lesser part in their daily lives. Only those consumers who never bought or drank wine were expressly excluded from participation in the consumer focus groups since they would be unable to contribute to the discussion of why wine is bought and consumed by participating individuals.

Whilst all of the interviewees were established to be wine consumers without exception the participants in the other three stakeholder groups all considered that they were able to be objective about the wine consumer and that it did not affect their professional behaviour at all:

I might taste a wine like a Rosé d’Anjou which is a sort of slightly sweeter style than I normally drink and probably a slightly cheaper wine than I normally drink. But I can still taste it fairly um objectively and say well, I don’t like it but it is actually quite a well made wine for that style and it will appeal to a certain – a sort of a certain type of customer.

(NWW4)

They therefore will not be treated as wine consumers during this thesis except where their contribution to the data collection would indicate habitus relevance.
4.4.3. Final Data Collection Processes

4.4.3.1. Trade Wine Buyers

Trade wine buyers can be considered to be experts in their own field therefore it was necessary that the instrument used to survey and collect their expertise be designed with this knowledge in mind.

The pool of expertise to draw upon for piloting the data collection was extremely limited if the author was not to ask those who were to be asked to participate in the main study to also develop the data range; as discussed previously there are only a small number of significant businesses providing wine to the UK consumer. The Delphi method (Green et al, 1990; Wilson, 2000) could have been seen as the appropriate and obvious data collection tool; the Delphi method is an accepted qualitative methodology for collecting data from experts via postal (or email) surveys in areas where there is little previous knowledge. A data range is sent to the experts, they comment upon the range, add in their views and opinions, and return the data for consolidation. The consolidated data range is returned for further comment and this process is continued until a consensus of expert opinion is established.

A practical problem with the use of the Delphi method was also raised; there are only a small number of significant trade wine buyers and because many of those involved in buying spend a great deal of time out of the country to expect anything like a meaningful response rate for a full Delphi sequence was felt to be unrealistic, particularly as it is primarily a postal technique and response rates for postal surveys can be as low as 40% (Oppenheim, 1992). This view was subsequently confirmed since it took eighteen months for the author to achieve the twenty seven interviews which it was felt represented theoretical saturation for this part of the research process.
As Wilson (2000) shows Helmer and Dalkey, who founded this research technique, were always definite that the Delphi method 'is primarily concerned with making the best you can of a less than perfect kind of information' (Wilson 2002, p. 1) at the start of an information gathering process and then building upon further information gathered and not a technique for gathering definitive data. Green et al (1990) also confirm that:

\[
\text{it is one of the most well established means of collecting expert opinion, and of gaining consensus among experts on various factors under consideration.}
\]

(Green et al 1990, p. 271)

Given the consensual nature of the Delphi method it was felt there was a danger that some of the chain unit buyers might have felt pressured to conform to the head office or standard opinion emerging, thus introducing bias. It was also felt that as eight different types of trade wine buyer were identified by this study data gathered via one to one interviews would be richer since it would enable identification of the culture of the different types of experts interviewed rather than their combined general opinion.

For all of these reasons it was not felt that the Delphi method, per se, would be suitable for the full data collection process. This plus the simple considerations that Mason (1996, p. 42) describes, in that 'the data you want may not feasibly be available in any other form', i.e. confidentiality and access would be greatly facilitated by the use of one to one interviews.

It was decided that the interviews must be open ended because of the exploratory nature of the research and therefore to take a 'general interview guide approach' (Patton 2002, p. 342) because whilst an informal approach might generate equally rich data it usually requires that the interviewees are interviewed several times over a period of time and that was not going to be possible.

It was decided to use a modified Delphi sequence to establish the range of data to be collected during the interviews as this way a pilot interview series would not be needed and this would
eliminate the problem of who to include or exclude from the piloting process. I devised the preliminary data range from my own expert knowledge, comments from the trade wine buyers in my study group peer cohort and background reading. This was then moderated by a Master of Wine and the Education Officer for the Institute of Masters of Wine. The moderated data range was moderated again by members of the West of England Wine and Spirit Association who are all active within the wine and spirits trade. The data range was revised and returned to the original moderators for comments and revision and the final data range to be used in the interviews was established (see appendix one).

Once the data from this initial study had been collected it was analysed before any further primary research was carried out. This initial analysis is often referred to as open coding since the data will be revisited during the final triangulation of all of the data and a different perspective or interpretation of the original coding concept may be developed as the research progresses. This is consistent with the actions described by Corbin and Holt (2005) concerning the ongoing evolution of grounded theory during the research process where they comment that:

\[
\text{in grounded theory, the discovery of concepts begins with the first interviews or observations. The importance of alternating data collection with analysis cannot be over emphasised...as concepts evolve during analysis they are used as a basis for subsequent data collection.}
\]

(Corbin and Holt 2005, p. 50)

### 4.4.3.2. Wine Producing Companies

A general interviewing guide approach using one to one in-depth interviews was considered to be essential for this particular stakeholder group because some of the topics for discussion which had been developed from the themes emerging from the initial data coding required discussion of topics which touched upon confidential business data. It would never have been possible to collect this data in anything other than a confidential one to one interview. Additional topics were added from the literature review and comments from a Master of Wine.
Pilot interviews had not been anticipated the subject areas developed to date being considered to be sufficiently robust. However, as described earlier, a series of pilot interviews were in effect undertaken in that whilst the initial interviewees in their USA head offices were not able to generate relevant data they did confirm that the subject range was correct. It could be considered that their inability to generate data re the UK wine market (currently the major world wine market (Vinexpo, 2005)) is another area which warrants some investigation, but not during this research thesis.

Although it was confirmed during the ‘pilot’ interviews that the subject range was correct the actual wording, the imagery and technical phraseology of the language used in the subject areas was reviewed as the final interviewees had different linguistic understandings from the pilot interviewees in the USA. As many researchers starting from Saussure have identified language has a cultural element and meanings are constructed differently in different cultures:

*There is no natural correspondence between signifiers and signifieds: other languages, will use different words for the same animal; one language like English can use alternative words (‘tom’ [for cat]); and the same signifier ‘cat’ can have other signifieds, (such as a ‘cool dude’ circa 1955).*

(Slater 2000, p. 239)

This means that the original open ended interview topics had to be reviewed so that any potentially contentious words or technical phrases, such as ‘young’ wine consumers, (aged 18 plus in the UK and 21 to 25 plus in the USA), ‘market research’ or ‘distribution chain’ had the same intended meaning for myself as interviewer and the interviewee (see appendix two).

**4.4.3.3. Wine Journalists**

One to one in depth interviews (see appendix three) were used to collect data from the wine journalists for similar reasons to the wine producers; confidentiality and finding a time when they were free and in the UK to set up an interview. The journalists were used to doing
interviewing themselves and commented freely about their own and their perception of others in their profession which would not have been the case if they had been interviewed together.

4.4.3.4. Wine Consumers

It was decided that information would be collected from consumers via focus groups (see appendix four), not because one to one interviews would not have produced rich data, but because theoretical saturation would have taken an unrealistic time to establish. Also the trade wine buyers and other stakeholders previously mentioned in this research were sure that there were groupings of behaviour and whilst suggesting that wine purchasing can be a solitary experience suggested that wine consumption is not normally.

Locke (2001) amongst others discusses the point that grounded theory research usually involves some kind of field work. Whilst the one to one interviews previously described could not be considered to be field work the observation of participants in their natural habitat, i.e. social groups consuming wine, lends itself naturally to discussion in social groups. Discussion and observation of wine consumption in a small group would allow for observation within an accepted cultural and social setting. Furthermore Barbour and Schostak (2005) recommend that:

[\textit{rather than convening groups of strangers} - \textit{advised by most marketing texts} - \textit{it is generally better to get as close as possible to the real life situations where people discuss, formulate and modify their views and make sense of their experiences as in peer groups.}]

(Barbour and Schostak 2005, p. 43)

They accept that this does not mean that there will be no hidden problems with a group convened in this way, individual and group histories, power plays and so on, but contend that because inter group trust and relaxed social intercourse is already established the data generated is likely to be richer than that gathered in a more conventionally convened focus group.
This aspect of trust was further added to as I asked the link person to decide the time, day and final number (between 4 and 8) of the focus group to best suit themselves: the ‘link’ was the person whom I knew and who linked me to the social group which formed the focus group. The rationale was both pragmatic, the link had to be able to gather their group when its members were free to be gathered, and to give the link person more confidence in the process since they were to a great extent organising the focus group themselves.

Although it is considered best practice to negotiate the principles involved with each interviewee individually both from an ethical point of view as their comments were to be recorded and to reduce potential symbolic violence being demonstrated by the moderator, i.e. the use of the data in ways that the participant would not have agreed to if their permission had been sought, this was simply not practical in advance; dates changed, members of the group changed and the author usually had no prior contact with the members of the focus group other than the link.

The link person had been given full details for the focus group concerning its rationale, how it would be recorded etc. but although they seemed to comprehend and agree to my agenda on the day it was often found that they had added in their own agenda as well. As described later this did lead to some unforeseen consequences but many social researchers (Strauss and Corbin, 1994; Patton, 2002; Crotty, 2003; Barbour and Schostak, 2005) all argue that if the moderator exerts sufficient power so as to be in full control of all the circumstances surrounding the focus group then they are without doubt negatively affecting the outcomes of that focus group and in order for the moderator to remain neutral and empathetic there must always be parts of the process which remain in the control of the focus group participants themselves.

It is generally considered good practice to have two moderators (Krueger, 1994: Henn et al, 2006) in case there are any problems to be dealt with; it enables one person to concentrate on
gathering the data, stimulating conversation, whilst the other can observe and reflect on the processes, ensure that recording equipment works correctly, address domestic issues etc. However this was not possible for the author for many practical reasons such as the travel, venue, cost and being able to react swiftly to changes. The use of a single moderator was not considered to be a significant problem in this study because each focus group took place in a link person’s home or other venue of choice and they, the link, inevitably took care of all domestic arrangements leaving the moderator free to run and record the groups. To ensure that the groups were accurately recorded both a dictaphone and video recorder were used. The dictaphone was most useful in the transcription of the data and the video for observing and reflecting upon the process.

The focus groups themselves were considered unlikely to release all of the information which their participants had access to just via a group discussion and, as previously discussed, the consumer groups identified had significant resemblance to national demographic groupings identified by Key Note Ltd, Mintel and Retail Intelligence. Whilst some authors (Putcha and Potter, 2004) suggest that it is not necessary to know who is in a focus group, just the basis on which it was constructed and that the statement was made, many others (Patton, 2002: Barbour and Schostak, 2005) would argue that data gathering can often be enhanced if the data can be attributed to a participant with a known demographic profile. Therefore, it was decided that all participants would be asked to fill in a short closed question Likert-based questionnaire which included basic demographic data such as age, occupation, income, newspapers read etc. (see appendix five). Added to this standard background information were closed questions on travel, children, shopping (particularly wine), and alcoholic drinks consumed. This was because themes that had arisen from the previous data indicated that these four areas, along with the consumers' cultural history and emotions could also have a significant effect on the rationale behind consumer purchase and use of wine. It was felt that whilst it was necessary to know about all these subjects and they would be discussed in the focus groups as specific subjects, the
details of shops used, children’s ages and other drinks consumed etc could be more usefully established in detail via this closed questionnaire leaving more space in the focus group for the cultural and emotional rationale to be explored.

After the closed question questionnaires and general interview guide had been developed and to ensure that this data collection was now robust a final pilot focus group was held. There had been a series of pilot consumer focus groups at the start of the study and the findings from these had then fed into the trade wine buyer study whose results in turn informed the wine producer and wine journalists interviews. All of these concepts and beliefs helped to construct the data collection instrument for the consumer focus groups completing the circle and emphasising the author’s pragmatic critically reflective stance throughout the research. Whilst the demographic questionnaire used in both series of focus groups, (initial pilot and final pilot) remained similar the subjects to be discussed and analysed in the final consumer focus group series had evolved significantly from those of the initial pilot series.

The link person for the final pilot consumer focus group was a fellow researcher with significant knowledge of focus group methodology but very little in the area of wine consumer behaviour. Her review of the data collection methodology in the final pilot focus group was used to finalise the organisation of the actual consumer focus groups.

4.5. Sampling Processes

4.5.1. Trade Wine Buyers

It is necessary to start by identifying the meaning of the phrase trade wine buyer: trade wine buyers buy for a wide range of retail outlets (and internet and direct mail companies are considered to be a particular form of retail outlet for the purpose of this study). Retail outlets fall into two distinct categories and conventionally are analysed or discussed by the trade, wine
consumers, Mintel or Retail Intelligence reports etc, in these two categories; the on-trade and the off-trade, i.e. consumption either takes place at or away from the point of sale. I believe that this is rather a simplistic view because analysis of the organisational structure of the business environment indicates that there is often significant, complex and even competing overlap between these two categories. Therefore the first process was to analyse the main organisational structures of the UK wine trade then it was possible to identify the different types of buyers, then to isolate a representative sample and identify actual potential interviewees.

4.5.1.1. Wholesale Companies

Drink wholesale companies can be complex or simple. Flynn et al (2001), describe one of the most complex and influential companies, First Quench. An explanation of how that company is constructed as well as a medium sized wholesaler and an independent owner operator wholesale company will give some idea of the variation encompassed by the term wholesale company.

At the time of data collection:

- First Quench bought for their own range of approximately 2,500 off licences (Key Note Ltd, Wine 2002, p. 42), which included Wine Rack, Threshers, Bottoms Up and Victoria Wine.
- First Quench was owned by Nomura and bought for their retail outlets. Nomura is a Japanese finance house who currently own 5,300 pubs (Key Note Ltd, Wine 2002, p. 42) making them the largest owner of pub chains in the UK as well as owning First Quench, the largest off-licence owner in the UK.
- First Quench bought for Whitbread. The Whitbread chain is the largest owner of on trade premises in the UK 1,250 retail units (Key Note Ltd, Wine 2002 p. 42); it includes restaurant chains (e.g. TGI Fridays and Dôme), hotels (e.g. Marriott) and leisure centres (e.g. David Lloyd).

3 Now part of Threshers
Other examples of large wholesale companies operating within the UK are Parisa and Allied Domecq\(^4\).

A mid-sized drinks wholesale company such as Matthew Clark, Lay & Wheeler, Enotria or Forth Wines do not own any retail outlets and whilst the wholesale company sells to both the on-trade and off-trade (including internet and direct mail companies) they often specialise in one area whilst selling in all. In neither of these large or mid-sized organisations is there a direct link or direct contact with the end purchaser, the consumer.

Independently owned wholesale companies, such as Eureka Wines, whilst the wine is imported from source as with the other wholesale companies and sales can be on or off-trade, are different again because most sales are local and the wholesale owner ‘knows’ the retail outlet. Whether they ‘know’ the consumer of the outlet is less obvious, but living locally they know some people who use some of the outlets.

### 4.5.1.2. Multiple Grocery Chains

In the multiple grocer sector the trade wine buyers buy solely for their chain, i.e. Sainsburys, Tesco, Asda/Walmart, Morrisons, and there is a direct link between buyer and outlet if not the end purchaser. They buy either direct from the winery particularly for own brands but also from wholesale companies or wine brokers. According to Key Note Ltd (2004, p. 29) 72% of off-trade sales in 2003 were made via multiple grocery chains, Lechmere (2006) suggests that this figure has now risen to 74.4%.

\(^4\) Allied Domecq / Allied Domecq brands now part of Pernod Ricard / Fortune Brands
4.5.1.3. Specialist Wine Off-Trade Chains

There are other business structures where the trade wine buyers buy solely for their organisation whose main product is the retail sale of wine, i.e. organisations such as Majestic or Oddbins. These companies buy direct from source and from specialist wholesalers and try to create a product, wine range difference to differentiate themselves from the multiple grocery chains, as with Majestic and the Swedish government wine auction in 2000.

4.5.1.4. Direct Mail or Internet Companies

Another type of organisation is the direct mail company where there is no physical retail outlet and the trade wine buyer provides access to their products for the consumer either via a catalogue or via the internet, e.g. Direct Wines or Virgin Wines. These types of organisations have, as will be shown in the results section, many similarities which is why they are described together here, as well as a few idiosyncrasies in the way people use them. Internet outlets which are part of a multiple grocery chain or independent retail outlet are a very minor part of the internet and direct mail market. The direct mail and internet companies source their wines as per the specialist chains and with the same rationale, range difference.

4.5.1.5. Independent Companies

As noted previously there are independent wholesale companies, those who buy from source outside the UK. They may buy for their own wholesale business and sell on to the on and / or off trade such as Eureka Wines or, as is more common, they may buy for their own off trade outlet such as Ballantynes of Cowbridge. As discussed by Flynn et al (2001) it is extremely rare to find an independent on-trade outlet which buys its wine directly from source because of the temporal and financial constraints this would impose upon the ownership / management structure. Where wine is sourced in this fashion it is generally in the ethnic food sector where family connections in the viticulture business make the process feasible, typically Italian or
Cypriot restaurants owned by one family member and sourced from vineyards owned by other family members. Most independent on-trade premises source their wines from a selection of national or independent / local wholesale companies, such as Avery’s, Yapp Brothers, Laymont & Shaw, or Bibendum.

4.5.1.6. On-Trade

A review of section 4.51.1. will show that most on-trade premises, be they restaurant or pub are covered in this section the minority not covered are independently owned and described in section 4.5.1.5.

4.5.1.7. Trade Wine Buyers Sample Interviewed

To enable this study of UK trade wine buyers to be undertaken it was necessary to establish a representative range of buyers. A perfect sample of buyers would have encompassed all of the different types of company and retail outlets previously described interviewing both the head office and the unit buyers; those responsible for actually ordering the wine into their unit on a daily or weekly basis and who are the ones most likely to be in actual constant contact with the consumer.

As previously discussed there are only a small number of significant wine importers to the UK and seniority within the wine buying section of the company was considered to be the most important factor when selecting the head office interviewees and the job itself for the unit personnel. Neither gender nor age were taken into account in setting up the interviews; for instance of the trade wine buyers for the six multiple grocery chains interviewed, three happened to be male and three female and whilst most interviewees were male the most significant wine wholesaler interviewed in Scotland was female. All bar one of the chain unit buyers were under 35; within all other groups there was a wide age range from early 30s to
nearing retirement. Whilst the interviews did not result in the perfect sample the head office and independent buyers represented over 70% of the wine bought in the UK and data collection was only stopped when theoretical saturation was reached.

The ten most wine significant multiple grocer chains were approached, and six head office interviews resulted. These six organisations provided 49.4% of all off-licence wine sales in 2000 (The Drink Forecast May 2001, p. 255). Only one unit buyer for a multiple grocery chain was interviewed partly because it was not possible to interview all of the equivalent unit wine buyers in the multiple grocer outlets both for time and logistical reasons and partly because this particular interview happened to take place quite late in the series of interviews and it was realised that no significant knowledge was being added to the data already collected from other unit buyer of chains, either on or off-trade.

13% of the remaining off-licence sales (off-sales not made by the multiple grocery chains) were provided by mail order, wine clubs etc, (The Drink Forecast May 2001, p. 256), and the head office buyers for two of the largest mail order / email providers were interviewed; there are no unit buyers in these companies. One head office trade wine buyer for the largest drinks wholesale company in the UK (supplying another 12% of all wines sold via off-licences and dominating ‘the off-licence sector’, (Key Note Ltd. 2000, p. 63) as well as being the main supplier for the largest group of on-licence chains in the UK (in 2000) was interviewed along with one unit buyer for a off-licence chain owned by that company. To complete representation amongst off-trade providers a head office buyer and unit manager for one of the two major specialist high street chains was also undertaken.

With regard to on-licensed premises, four interviews were held with different sized drinks wholesale organisations which supply primarily or entirely to the on-trade, plus the one
previously mentioned. There were also seven interviews with the unit wine buyers of independent, ethnic and chain restaurants.

All except three of the organisations interviewed had a single company / product image as would be found in companies such as Sainsbury’s, Tesco’s, Enotria or Liberty Wines. For the three organisations which were multi branded this was partly due to organic growth and partly due to business strategy. One was a direct mail company the other two were interviewed as drinks wholesale companies. They preferred to keep their company name away from the consumer market place and use various product brands or retail outlets to focus the consumers mind demonstrating the economies of scope discussed in chapter three:

*Well in terms of marketing the name of X not at all ... our business unit is called Y, so X means nothing, but having said that we don’t even market Y to the consumer, what we market to the consumer is Z [a top selling brand within the public house sector] ... or our other brands because that’s what we think they’re buying. The fact that we’re Y is really a trade name and we use that name when we’re talking to the trade ... but what we’re about is our brands in terms of consumer communication.*

(NWW1)

The trade wine buyers have been coded into groups so that quotes can be attributed both accurately and anonymously. The twenty seven trade wine buyers were allocated into eight groups shown in table 4.1.

<table>
<thead>
<tr>
<th>Anonymity Code</th>
<th>Trade Wine Buyer Type</th>
<th>Number of Interviewees</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDM</td>
<td>Those who worked for, or owned, Email and Direct Mail organisations</td>
<td>3</td>
</tr>
<tr>
<td>IWW</td>
<td>Those who owned their own Independent Wine Wholesale business</td>
<td>2</td>
</tr>
<tr>
<td>MGC</td>
<td>Those who worked for and were head office buyers for Multiple Grocery Chains</td>
<td>6</td>
</tr>
<tr>
<td>MIRO</td>
<td>The Managers of Independent Retail Outlets, both on-trade</td>
<td>2</td>
</tr>
<tr>
<td>NWV</td>
<td>Those who worked for large National Wine Wholesale companies</td>
<td>5</td>
</tr>
<tr>
<td>OIRO</td>
<td>The Owners of Independent Retail Outlets, both on and off-trade</td>
<td>3</td>
</tr>
<tr>
<td>UCOFF</td>
<td>Those who worked as Unit managers for Off-trade Chains</td>
<td>3</td>
</tr>
<tr>
<td>UCON</td>
<td>Those who worked as Unit managers for On-trade Chains</td>
<td>3</td>
</tr>
</tbody>
</table>

Table 4.1: Overview of Trade Wine Buyer Types and Thesis Sample
The interviews took place throughout the UK wherever the head office or specialist unit was situated; most of the interviews with unit wine buyers of chain units took place in Cardiff for pragmatic reasons as it was felt that the systems within which they operate would be the same nationally and the choice of unit wine buyer would inevitably be random.

Whilst there are more (eleven) interviewees in the NWW and MGC groups these are the two main types of organisation responsible for bringing most of the wine sold into the UK into the UK, as previously discussed, and therefore would expect to have more representation than other groups. Within each category each interviewee has been allocated a number. The number indicates the order in which they were interviewed and does not have any other significance.

4.5.2. Wine Producing Companies

The interviewees were identified as being the UK and or European head of marketing for the three most significant wine producing companies importing into the UK. There were no refusals, partly, the author believes because the nature of the research was likely to be of intrinsic interest to them and partly because some at least had already heard about the research and were intrigued by the proposal.

Fragmented wine production around the world, especially in old world countries, where wine is 'very strictly regulated according to types of grapes and processes' (Key Note Ltd 2004, p. 35) means that the world market for wine, unlike most FMCG markets, is not dominated by a few brands at the point of consumption; in wine terms a significant player/brand can have '2% of the total UK market share' (WPC3), see figure 5.2. There has been significant consolidation in Australia and other new world producing countries, as highlighted by Lockshin (2004, p. 30), of the 'more than 1,600 wineries in Australia...the largest 20 account for 95% of the sales.' It is
these vast 'consolidated', national or international companies which dominate the UK wine market through their numerous wine brands.

All three companies whose representatives were interviewed appear in Key Note's (2004) list of Major Wine Shippers, Agents, Distributors or Wholesalers, (table 21) and their table of Major Wine Companies in the UK (table 22); eight of the top selling wine brands in the top twelve are made by these three companies. (Key Note Ltd., 2004, p. 55), and one organisation does indeed have the magical 2% of market share previously mentioned.

Once the interviews had been completed each interviewee was allocated an anonymity code. Where comments are quoted directly, as in WPC3, this signifies that a representative of a Wine Producing Company is being quoted and the number, as with the trade wine buyers, is simply the order in which they were interviewed.

There were only three interviews conducted for this study. It may be considered that only collecting three hours of data in one study and twenty seven hours of data in another could unbalance the data generated and create bias. However as Locke (2001) and Corbin and Holt (2005) confirm there is no numerical point at which theoretical saturation point is reached, it is instead dependant upon when no new information is being generated or more precisely when no new categories of information are being generated. The trade wine buyers have a diverse profile and can influence the consumer in many many ways therefore a large number of interviews were required before it was felt that a full set of data had been constructed. The people interviewed as representatives of the three largest wine producing companies importing and selling within the UK market were all identifying the same concepts, although not all of the concepts that they identified were the same as the ones generated by the trade wine buyers. The wine producing company representatives all had direct influence over the consumer in a similar fashion, via their product, wine price and quality and marketing. In the highly competitive UK
market they spent more time trying to influence the trade wine buyers to list their wines than trying to influence the consumer directly. Saturation was achieved via a smaller cohort of interviewees because of the similarity of their responses and the dominance of their companies on the UK market.

4.5.3. Wine Journalists

The potential interviewees were initially identified because they were mentioned by the first series of pilot consumer focus groups and or because the trade wine buyers identified them as potentially significant. A table, 4.2, was created to ensure that all aspects of ‘wine journalism’

<table>
<thead>
<tr>
<th>Media Worked in</th>
<th>Example</th>
<th>WJ1</th>
<th>WJ2</th>
<th>WJ3</th>
<th>WJ4</th>
<th>WJ5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grocery Retailer In House Magazines</td>
<td>Sainsbury's, Waitrose</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Specialist Wine Magazines</td>
<td>Decanter, Wine</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trade Magazines</td>
<td>Harpers, The Grocer</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Magazines</td>
<td>Good Food Woman and Home</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>National Newspaper</td>
<td>Independent, Daily Mail</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Lecturer / after dinner speaker</td>
<td>WSET lecturer / wine appreciation events</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Wine Competition Judge</td>
<td>Decanter International Wine Challenge</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>TV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Website author / owner</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sample Spread</td>
<td></td>
<td>5</td>
<td>7</td>
<td>6</td>
<td>10</td>
<td>7</td>
</tr>
</tbody>
</table>

Table 4.2. Analysis of Wine Journalist Representation across all Significant Media

NB these people may also find themselves quoted in Point of Sale information or websites as a result of information generated in the media noted above.
were covered and snowballing techniques were used to increase the number of interviewees where representation was considered to be low.

Whilst there were some obvious forms of media which I was able to identify at the start of this research process, such as newspapers, TV and Radio, the other, less immediately obvious ones, such as wine competition judge, evolved during the data collection process; wine competition judge is considered significant because when a wine wins or gets any significant form of write up it generates publicity in various forms of media, i.e. magazines, but also point of sales information. These 'shelf talkers', as Joseph (1999) describes them are considered to be a very powerful form of media, more fully described in the Results chapters.

During the interviews, as will be seen in the Results chapters, the wine journalists discussed their own and other journalists work, attitudes and beliefs. They know each other well often meeting up at the same trade shows, judging the same competitions or writing for the same or similar publications. After the five wine journalists had been interviewed they had identified only one other journalist whose views might well be significant and different; four out of the five said that this journalist had a different attitude in one specific aspect, internet usage, which concurred with the views of the fifth wine journalist. It was not possible to interview this wine journalist but she agreed to review the first draft of the Wine Journalist Results Chapter and agreed to her comments being incorporated into the final chapter. This journalist added in comments which did not disagree with the overall findings of the chapter except, as predicted, in the area of internet usage. It was therefore decided that theoretical saturation had been reached at this point and the data collection finished.

Again the wine journalists were allocated an anonymity code to identify their quotes, and the numbering was allocated in order of interview, i.e. WJ3 was the third wine journalist to be interviewed.
4.5.4. Wine Consumers

Amongst other identifying criteria the trade wine buyers had identified four age groups of consumers; Wine Intelligence (2002) identified and discussed two age groups of younger consumers with distinctive buying and consumption patterns; statistical reports such as Key Note and Mintel use nationally accepted age bands as well as social grading to categorise their data across a variety of consumer behaviour reports.

<table>
<thead>
<tr>
<th>Trade Wine Buyers</th>
<th>Wine Intelligence 2002</th>
<th>Key Notes Ltd and Mintel</th>
<th>Final Age Range for Consumer Focus Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 – mid 20's</td>
<td>18 – 24</td>
<td>18(15) – 24</td>
<td>18 – 24</td>
</tr>
<tr>
<td>Mid 20’s – mid 30's</td>
<td>25 - 34</td>
<td>25 – 34</td>
<td>25 – 34</td>
</tr>
<tr>
<td>Mid 30’s – mid 40's</td>
<td>35 – 44</td>
<td>35 – 44</td>
<td>35 – 44</td>
</tr>
<tr>
<td>Mid 40’s +</td>
<td>45 – 54</td>
<td>45 – 54</td>
<td>55 – 64</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>55 +</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>65+</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Experts</td>
</tr>
</tbody>
</table>

Table 4.3: Development of Age Range for Consumer Focus Groups

It was decided that the focus groups should be based upon age banding, 18 – 24, 25 – 34, 35 – 44, 45 – 54, 55+ and an expert group as shown in table 4.3. As shown in table 4.3 there was a strong correlation across most of the age groups other groups were developed specifically for this thesis. The rationale for using five rather than the six age bandings identified by Key Note and Mintel was that consumption and therefore purchasing fell so low at the upper end 70+ that if there were two groups the results might bias the study as a whole. Conversely it was felt that if the trade wine buyers groupings were stuck to too rigidly, i.e. only the four groups identified then again bias would be introduced because buying and consumption patterns between the 50 year old and the 70 year old consumer are very different for a significant number of FMCGs and wine consumption peaks in the 45 to 54 age group and declines afterwards (Key Note Ltd, 2004, p. 60).
The sixth focus group was designed specifically to identify the behaviour of perceived experts, the 'wine buffs'. All of the interviewees in the preceding three stakeholder groups had identified that this small but possibly very influential group existed. They did not always agree with regard to wine buffs' behavioural attributes. As the UK wine buff population was speculated to be very small, between (5% and 10% of the UK wine drinking population by the trade wine buyers, the wine journalists, and the actual make up of the pilot series of consumer focus groups) it was decided to actively seek out a group of experts; then analysis of specific behaviour characteristics could be attempted. The committee of a local wine tasting group was approached to be this expert focus group. All members of this group were known to have taken WSET wine qualifications from the initial Intermediate Certificate to one who had just commenced their studies to become a Master of Wine and they had all volunteered to be on the committee of a local wine tasting circle organising monthly meetings. Therefore they were included in the expert group because they demonstrated their active and overt participation in continuously seeking out information and knowledge about wine, albeit at different levels.

Wine consumption is split fairly evenly across the genders, 62.1% of all adult males and 68.6% of all adult females consumed wine in 2003 (Key Note Ltd, 2004, p 60). It was intended that the overall make up of the focus groups would be representative of national statistics and the link people were asked to have an even split between genders, as well as inviting participants who were in the right age band and drank wine socially. No other criteria were given; this was deliberate as it was intended that the groups whilst being homogeneous with regard to the activity of buying and drinking wine should be as representative of UK society as possible. When the first focus group turned out to be all male, a couple of female drop outs had been replaced with male friends, it was anticipated that this would be a problem. However the link for the second youngest group, the only one which took place in an office environment, then said that all her group would be female as she worked in a mainly female office and all the people in the correct age group were female. All focus groups had been asked to have between
four and eight participants, with six to eight being the preferred number as these numbers are both manageable in size for one person to moderate, and helped to maintain balance of information between the focus groups and their structure. The all male group had six participants and the female one eight. Whilst this meant that there is not a direct representation of both genders across all age groups it is in the nature of focus groups that it is not always possible to have the perfect representative range and since overall 53% of participants were female and 47% male this was considered in line national statistics and not considered to have introduced undue bias.

It had been intended that all the focus groups would be held in the link person’s home with the discussion taking place seated around a table and that wine would be used as a facilitating tool. This setting would ensure that the discussion took place in a natural setting for wine consumption and discussion whilst sitting round in a circle is recommended best practice for the conduct of a focus group (Putcha and Potter, 2004).

Snowballing techniques were used to contact the link person for each focus group, and most of the other participants were unknown to me. Whilst the use of snowballing techniques has the potential to introduce bias, it was only practical that the link person be known to me. Care was taken that the link people were taken from across my social contact spectrum, family, work and social so that the widest pool of potential focus group participants was reached. Only the participants in the expert groups were all known to me, to a greater or lesser extent, since I am a member of the same wine tasting circle. This was a pragmatic decision taken because experts in any discipline in any one locality often know other experts in that locality however culturally diverse their habitus may be with regard to other social groups.

Care was also taken in each case to choose a link that met the focus group criteria, and lived in an appropriate part of the British Isles. A study of wine buying and consumption patterns
established that most ‘wine drinkers live in southern and eastern England’, (Key Note Ltd 2004, p. 61) therefore it was decided to hold a significant number, i.e. three, of the six focus groups in this part of the UK. It was not deemed to be important which part of the UK the expert focus group was based in, since logic and the primary data collected from the first three studies indicated that wine buffs would follow their interest in whatever part of the country that they were based. Christy and Norris (1999) identify in their paper on the specialist cheese market, which they compare to aspects of the specialist wine market, that one of the defining activities of members of these types of groups is their involvement in ‘discovery’ markets. It is the activity of discovery, not ease of purchase, which is the driver for this group of consumers.

Wales was not shown to be a high wine consumption region as whole but since the data was available for Wales as a whole rather than a separation of the more urban and cosmopolitan south east from the more rural and traditional north and west, it was not felt that bias would be introduced if convenience sampling was used. More people live and more consumption takes place in urban areas generally and Cardiff is where I am based, therefore the other three focus groups were held in Cardiff and Swansea; the 18 – 24, 50+ and expert groups.

Finding a link person for the youngest age group proved quite difficult since I did not know anyone in this age group except university students or ex students of UWIC’s Welsh School of Hospitality Tourism and Leisure Management. It was felt that anyone in this group would introduce bias into the study both on the basis of above average knowledge and since it would be quite likely that all the focus group participants would be hospitality students or ex hospitality students. Eventually a link person was identified but as the link was only just 18 he had no home of his own; the only person not to be able to provide a venue. After discussion it was decided that this focus group would be held in the home of the link’s father and that he would be present in the house during the time that the focus group took place. Since the link
was known to take friends around to his father’s house the setting would still remain natural.
The link was the youngest person in the group.

The 25 – 34 focus group was the only group which did not take place in a home environment.
This was the London group and as work based travelling can be very time consuming in London
the link for this group who all worked for a large international publishing house, decided that
her focus group would be held in one of their conference rooms on a Friday at the end of the
working week and then all the participants would be able to go on from there and start/continue
their weekend activities.

One unforeseen problem arose when setting up the 35 – 44 and 45 – 54 groups; this was that of
the age of the participants and their partners; most people in these age groups did have partners.
Both link people fell into one of each age group, which had been deliberately arranged, but their
partner fell into the other age group. This had not been anticipated and it became obvious that
this was also going to be a problem with most of their friends. It was therefore decided that
each link person would be asked to have half of their focus group from the younger 35- 44 age
group and the other half from the 45 – 54 age group. This way a representative set of each age
group would be interviewed, albeit not in the same focus group.

As the participants arrived for the focus groups they were given a glass of sparkling wine and
asked to fill in the closed questionnaire which provided the basic demographic data previously
discussed (appendix five). They were given a glass of sparkling wine a) to clear their palates for
the wine tasting and b) because the focus group was about wine and its consumption.

Once the demographic data had been collected, the discussion started. Some authors such as
Patton (2002) suggest that demographic data should be taken at the end of the focus group as
this can be boring and perceived as ‘hard work’ putting the potential participants into a negative
frame of mind. However after reviewing the pilot focus groups it was decided to gather the demographic details at the start of each focus group for a combination of the following pragmatic reasons. All of the link people decided to hold their focus groups in the evening and always on a Thursday, Friday or Saturday. This meant that people arrived over a period of time, had a glass of sparkling wine, filled in their demographic details and started to chat about the day’s events in general until all the focus group participants were present therefore a convivial atmosphere started to evolve naturally. This was an unexpected bonus but then one of two motivators for the evening ahead became apparent within the groups.

In some focus groups the focus group was just the first event of the evening and the participants were going on afterwards and so had a time by when they had to leave, (usually two hours after the ‘official’ start of the focus group); this applied to the two younger groups. Whilst this left plenty of time for the focus group it did mean that some participants were clockwatching a bit by the end, ready to move onto their next social appointment. The second motivation for attending was that the link person had decided that they would use the focus group as an excuse to have a social event. This meant that the participants were out for the evening and sometimes it was hard to keep the group focused as it wanted at the end of the day to become relaxed and social. It was harder still to prevent the host/link from producing more wine and starting the party early. This general behaviour seems to indicate that wine consumption in intrinsically linked with conviviality in most people’s mind and this theme is followed up in the Results chapters.

Whilst it is possible that this conviviality could have diverted conversation away from the data gathering process it did also ensure that the focus groups, even where many of the participants did not know all of the other participants, became ‘natural’ social gatherings quite quickly and so it may also be that as a ‘real’ or natural situation occurred it may have had the effect of
producing much richer data than would have been forthcoming in more formal, daytime situations.

Despite the behaviour just described there was still tension in the group once the formal part of the focus group started, a natural wariness about what the participants ‘had let themselves in for’. Therefore to start the discussion three ice breaker questions were devised. The first request was each participant’s name and description i.e. ‘I’m Jack and I’m wearing a blue and beige jumper’ and since all participants understood that this was to identify themselves for the tape it was a very non-threatening easy statement to make. The second subject was to say what their favourite alcoholic drink was, again a non-threatening and easily answered question. Patton (2002, p. 369 - 370) recommends that ‘the presupposition format’ be used for these types of subjects as it is much more likely to generate an open response and some less confident participants having successfully answered a question correctly or negotiated a potentially embarrassing question feel more confident to actively participate in the rest of the discussion.

The third subject deliberately moved towards the more in-depth and potentially threatening subject areas. However I have been asked this question often enough when alcohol is discussed to be fairly sure that a) every participant would know their own answer and b) most people, although finding the question slightly embarrassing, also usually found it and others’ answers funny. Humour and laughter when used correctly can help to generate a natural, friendly atmosphere although care must be taken to ensure that the laughter is with and not at the participants and that the moderator does not slip out of neutrality and become a participant (Puchta and Potter, 2004). The third topic was, ‘when did you have your first alcoholic drink, cider behind the bike sheds, Granny’s Christmas sherry, etc?’ This question was always addressed to the link person first who was known to the author and after a full round of the same question the ice was completely broken.
After approximately 30 minutes discussion a small blind tasting was introduced because during the initial focus groups it had become obvious that the blind consumption of wine stimulated what was still sometimes a slightly unnatural conversation. The blind tasting consisted of three wines, one of the top five on-trade and off-trade brands, an introductory level ‘classic’ wine and a typical restaurant wine. The rationale for the three wines was to investigate actual naïve, knowledge, behaviour and personal views as opposed to informed knowledge and views. The branded wine had initially been intended to be Jacob’s Creek because of its high profile and awareness as well as position in the purchase hierarchy. However when the actual purchasing took place it was discovered that another wine also in the top five on and off trade brands was on special offer reduced by £1.50 to £3.54p, and it was decided to purchase this wine instead since all previous data suggested that this is exactly what consumers at this price point would do. The contrasting wine was a Rhône made by a producer generally considered within the trade to make a classic wine which could be purchased in upmarket supermarkets and specialist wine chains, even if probably for a special occasion rather than a simple evening in; the purchase price was £7.00. The third wine was a white Pinot Grigio again a top selling wine this time in the mid priced restaurant sector. It was felt that all of the wines, which were available nationally, could have been purchased and or consumed by all of the focus group consumers previously. The idea was not to surprise and inhibit, but to stimulate participation and interest in the discussion; several participants commented ‘I’ve seen/drank this wine before and ...’. If the wine had been very unfamiliar to the participants it would not have stimulated response in the same way; it would instead have been a way of me as moderator displaying power and negatively influencing the group discussions.

One other change from the pilot focus group was that in the final consumer groups the consumers were asked to write down their basic thoughts about the wine before they knew what they were, (see appendix 6). This was done in silence and it prevented the less extrovert from conforming to peer pressure. Sometimes the less confident were able to demonstrate more
knowledge blind than those who were more dominant in the discussion and as researchers (Gibbs, 1997) agree confidence given by whatever medium to the less confident can help to balance out power relationships within a focus group.

When the wines were revealed this again stimulated, as it had done in the pilot series, a very animated conversation in which the consumers naturally started to discuss with each other why they had had their previous thoughts and how knowledge had changed their views, or not. An explanation of my buying behaviour for the focus groups was given at this point in the discussion to stimulate conversation in a potentially difficult area. As discussed earlier when focus group participants feel that they could be committing themselves to admitting to an embarrassing personal act, i.e. admitting to buying wine cheaply whilst on promotion, having the activity presupposed and already discussed can reassure and thus facilitate richer reflection and discussion; part of the author's rationale for buying the wine on offer instead of the original style chosen. The discussion by now was usually quite animated and this enabled any uncovered topics to be raised and where there was a query for it to be re-covered. In particular marketing, advertising, pricing, social situation and peer influences were usually discussed at this point in great depth.

The focus groups were also asked to look at wine bottles and their labels, this was again to stimulate conversation but also to try to establish if there was any consensus on what made an appealing bottle, what visual cues would prompt them to buy as this subject had also been raised by both the trade wine buyers and the literature review.

It had been suggested before the pilot group that just the labels themselves would be sufficient, however, to prevent fraud most labels are almost impossible to soak off and in the pilot group where labels and bottles were both used it was the bottles which had stimulated most conversation. They (the labels alone) ‘do nothing for me’, and after the first glance they were
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ignored but the bottles, clumsy though this was, were handed round and discussed. I believe that this is part of the tactile nature of wine consumption, it confirms the research in chapter three and is further discussed in the Results chapters.

All of the focus groups were recorded and they were also video taped. The video tape was there as a back up but also to record facial expressions if required and to enable names to be allocated to particular statements if this was not obvious from the transcription of the tape; all participants had used their first names. It had been suggested that to provide the complete anonymity that should be provided by focus group moderators, (Gibbs, 1997) the participants could be asked to use false names but the link for the pilot had tried to use this techniques and it had proved very difficult as participants kept forgetting their ‘new’ names. All of the focus groups were happy with the level of anonymity provided by the use of first names and the focus group in which they participated, i.e. FG1 identifies focus group one and FG1Jack, identifies participant Jack from the first focus group. It was necessary to have some naming procedure so that the initial questionnaire could be linked to each participant and their statements.

**4.5.4.1. Ethics and the use of Alcohol during Consumer Focus Groups.**

As Charters (2004) discusses the use of wine (and beer) tasters in this type of focus groups is not unusual and Gibbs (1997) confirms that an incentive usually needs to be offered to any focus group participant. In both Charters’ study and this one the wine was to act as a stimulus to discussion generally and as a reward for participation; in his thesis to help with the aesthetic evaluations and in this thesis to assist with language and tactile evaluations looking, smelling drinking, touching (bottles) and discussing. Whilst the use of wine in appropriate focus group sessions is an accepted practice over-consumption would be unethical and make the data gathered unreliable.
In order to maintain an ethical stance and prevent over-consumption during the focus group ISO tasting glasses were used. As tasting glasses they only contain a tasting amount of wine which is less than half a minimum UK measure of 125 ml and each wine was poured into a separate glass so that it did not have to be finished before the next wine was tried. All participants were told that they did not have to do anything more than taste each wine once and water was supplied at each focus group. This ensured that each participant during the one and a half to two hours of the focus group was asked to try less than two units of alcohol. This is within the UK governments recommended alcohol consumption guidelines, 2-3 units per day for women and 3-4 for men. By using standard glasses throughout the series of focus groups variation in taste caused by different glasses could be eliminated.

4.6. Summary

In this research
- my initial hunches and knowledge plus data from an initial pilot consumer focus group series generated, via the Delphi method, a general interview instrument for in-depth interviews with the trade wine buyers
- the data in this first study underwent open coding and several potential themes were identified
- these themes were used to help construct the general interview instruments for the wine journalists and wine producing companies
- the data generated by these interviewees was analysed both open for new data pertaining just to the consumers (or each other) and axial where it related to the trade wine buyers and was triangulated with their original comments
- all of this data was then constructed into the themes for the consumer focus groups: the original themes of the trade wine buyers relating to the consumers, the original themes constructed from the wine journalists and wine producing companies plus those themes that
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had originated from the trade wine buyers, gone out to the wine journalists and wine producing companies, and been reconstructed. Current theories on consumer culture also informed the focus group subjects.

Finally all of the then existent subjects and themes were analysed/ reanalysed, core coded and underwent a final triangulation enabling the development of theories in relation to the purchase and consumption of light wines within the UK. The robustness of the theories is supported by the continuous analysis in the generation of the theory and triangulation within the research process and against current consumer behaviour theory.
### Chapter Five
#### Results – Trade Wine Buyers

#### 5.1 Introduction

#### 5.2 Consumer Characteristics
- 5.2.1 Consumer Types
- 5.2.2 Gender
- 5.2.3 The Influence of Stress, Anxiety and Mood
  - 5.2.3.1 Stress and Anxiety
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#### 5.5 Summary
Chapter Five

Results – Trade Wine Buyers

5.1 Introduction

The trade wine buyers, especially the head office buyers, tended to fall into two categories i.e. those who worked for multiple chains and were primarily concerned with sourcing well made value wines at under £5 off-trade, a market led approach, and those who sold niche market wines at a price that the market is prepared to pay, a producer led approach.

All of their comments were made within the context of their overall perception of the world and UK wine market. They agreed that planting new vineyards and developing new wine products was a long term investment, four to seven years for a maximum return, with a large amount of capital tied up in the meantime:

*I was at Hardy’s for a year [2000] and they were looking at a 2007 business plan ... if you have to start planting the vineyards to produce in five or six years time that is 2007.*

(MGC1)

But that if planting continues at its present rate and consumption patterns remain the same by 2008 world over production will have reached over 53 million hectolitres (Vinexpo 2005 p. 3-4). It was suggested that as a result either a lot of producers, particularly smaller ones, go out of business or new markets world wide will have to be developed:

*so certain areas of France are going to – for instance France are going to suffer. There’s always going to be a demand for the classics, but I don’t think they’re going to be particularly affected by this glut of wine but it’s at the lower end – is where the problems are going to be ... and I can see prices plummeting in the New World.*

(NWW3)

Many buyers felt that the market would just continue to expand with no effort on their part and perhaps the excess would be taken up by developing new markets:
the world market still has phenomenal opportunities, when you look at the whole area of the Far East, pacific rim.

(NWW2)

Others felt that the trade would have to become more proactive in seeking out new markets in order to survive:

the next leap is to move outside the wine market or the wine consumer and try to find a new group of consumers. That's going to take an awful lot of work and is going to be expensive to do, because I don't think the wine trade has any real concept of marketing in an effective manner and it certainly also doesn't have enough money to do so.

(EDM1)

The results of the interviews are grouped into three categories. The categories are consumer characteristics, the physical and social aspects of wine and the business strategies deliberately followed by the organisations interviewed. The themes are developed from the trade wine buyers' own observations and beliefs; in a few cases the results of in-company research and research already in the public domain. Whilst only the large organisations had the company structure to carry out significant consumer research there was no correlation in relationship between the size of the company independent or national, on or off-trade and awareness of either quantitative or qualitative data within the public domain.

5.2. Consumer Characteristics

This section presents the trade wine buyers perceptions of consumer characteristics and behavioural traits.

5.2.1. Consumer Types

As shown in table 5.1, the trade wine buyers identified several different types of consumer behaviour. One type was based upon lifestyle and the other two were based upon purchasing and consumption environment.
Lifestyle was noted as an evolutionary factor in purchasing wine with regard both to propensity to buy and to the type of wine bought. It very closely linked age, personal income, marital status and age of children; age was the primary demographic used to identify these consumers. This links back to chapter three suggesting that the trade wine buyers were implicitly aware that our behaviour is linked to our habitus, perhaps because they are wine consumers themselves. Lifestyle was the range used in the consumer focus groups because the other two behavioural types are modified by the environment, agreeing with Hall et al (2001) that behaviour is situation as well as lifestyle dependant.

It was accepted that much more experimentation took place in the off-trade than in the on-trade because of the differing stress levels in each environment and because most consumers are well aware of the profit margins in the on-trade. This was the rationale given to explain why consumers moderated their behaviour sufficiently differently so as to be able to identify four behaviours in off-trade environments and three in on-trade ones. It was also agreed that most consumers, apart from the uninterested, would from time to time buy as if they belonged to a type other than their usual one; wine buffs might buy on promotion and novices might buy a classic wine for particular occasions.
## Trade Wine Buyers Identification of UK Wine Consumer Types

<table>
<thead>
<tr>
<th>Age / Lifestyle</th>
<th>Off-Trade</th>
<th>On-Trade</th>
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<tr>
<td><strong>18 to mid 20's</strong>&lt;br&gt;Young, single, often on a limited income, drinking mainly in the on-trade as part of their general lifestyle. The consensus was that this group drank very little wine, a view backed up by Mintel (Wine, 2003) which also shows that new wine drinkers in this age group are reducing. This factor is attributed by both the trade wine buyers and Mintel to the introduction in 1996 of FABs. About half the trade wine buyers were not worried by this trend pointing out that historically most people only came into wine drinking in their mid 20s when they married and started to set up a family.&lt;br&gt;A belief held by all the buyers was that this group tended to buy on price and alcoholic strength.</td>
<td><strong>The uninterested consumer / price promotion junkie</strong>&lt;br&gt;Not only are they ignorant about it [wine] but they're not particularly interested, they just want something decent to drink with the pizza that's coming round this evening (EDM2)&lt;br&gt;As Beardsworth and Keil (2000) show for certain consumers the meat is the main object of the meal and all other objects, e.g. wine are ancillary: there is a lot of people who do think that, it's an accompaniment to a meal and you're not going to spend more on the accompaniment than you are to the... the meat which is the main thrust of the meal. (MCG5)&lt;br&gt;For this consumer price was the main driver, possibly alcohol content. These consumers could either buy purely on promotion or they might buy exactly the same wine each week just as they would Heinz baked beans, Typhoo teabags or whatever (MGC6).</td>
<td><strong>Price conscious and nervous.</strong>&lt;br&gt;These consumers would never ask for assistance and generally buy the house wine or the wine just above that if it is a name they are familiar with. House wine could be considered to be a positive as well as safe choice however since if you go to a good establishment, a restaurant I mean, and if the proprietor is serious about his wine will have a good house wine so there's no shame in drinking house wine in fact the contrary. (OIRO2)</td>
</tr>
<tr>
<td><strong>Mid 20's to mid 30's.</strong>&lt;br&gt;More affluent, but likely to be starting families and so likely to be moving towards home consumption. Traditionally this was the age at which significant wine drinking began for many people, and for some buyers there was the assumption that this would continue because:</td>
<td><strong>The novices.</strong>&lt;br&gt;'Customers who want to lurk' (MGC6), to learn about wines, to be able to choose wines confidently but who lack the knowledge, and the confidence to do so. For these consumers it was felt that branding and promotions were the main influences to buy; as long as they trusted their supplier the range of wines they...</td>
<td></td>
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as they get older they go into a family environment and they go to friends 'oh well we’ll take a bottle of wine', because it's the done thing and suddenly they find that they like wine. (IWW2)

This group was assumed to prefer the New World styles of wine, simple, consistent and fruit driven, because they were moving from pub drinking, where easy drinking styles are the norm, to home drinking.

Not all of the trade wine buyers assumed that this development would be automatic.

**Mid 30’s to mid 40’s.**

More settled, and to be moving away from the *party occasion* towards

*the ‘older dinner party where the Rhône and the good quality German wines come in* (MGC5).

There was speculation that this group was becoming more sophisticated in their wine tastes and usage; more simple fruit driven styles for social drinking, and traditional more structured and tannic Old World styles with food.

It was also suggested that the palate maturing away from sweet to savoury flavours drove this movement in wine usage.

had to look at was reduced and highlighted; brands produced the comfort of familiarity.

For this group, name familiarity is part of the attractiveness of the wine a point discussed by Charters et al (1999); Wine Intelligence (2002) showed that recommendations from family and friends was also a significant factor for inexperienced consumers.

**The experimenters.**

Some of the novice buyers would, as their confidence grew, move into this group. These consumers were not driven solely by price but instead were regular consumers of wine ...having a bit more knowledge and actually enjoy experimenting and not afraid to take a risk. (MGC4)

This group is not driven by price and may well buy above the national average off trade bottle price of around £3.75, but they are likely to have price limits; for example

*if they find a bottle at £5.00 a bottle which they're enjoying they’re not necessarily going to say ‘oh I’ve got a bit of money in my pocket I’m going to pay a £7 bottle of wine.* (IWW2)

As experimenters these consumers will not be loyal to one wine or a limited range and whilst they may try a wine more than once they will be constantly looking for new wines.

They are also quite likely to be members of wine clubs or societies.

**The Confident.**

They tended to choose their wine without help or reference to a sommelier. The buyers working in restaurants agreed that some of this group could become quite 'snoopy' (MIRO1), refusing advice and assistance especially if it was from someone young and therefore perceived to be inexperienced.

These consumers, tended to pride themselves on their ability to choose wine although they may have little knowledge and so would usually make a ‘safe’ choice, ending up with a classical wine style, such a Sancerre, Chablis or Burgundy.

The wine buyers speculated that this could be one reason that there was such a high take up of French wines in the on-trade in comparison to the off-trade. (Possibly the wine bores, or some of them)
Trade Wine Buyers Identification of UK Wine Consumer Types (cont)

<table>
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<tr>
<th>Age / Lifestyle</th>
<th>Off-Trade</th>
<th>On-Trade</th>
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<tr>
<td>Over 45’s.</td>
<td>The wine buffs. Knowledgeable, enthusiastic and well read; not price but quality driven. It was acknowledged that some wine buffs knew more about their special interest wines than many employed in the trade because of the time they devoted to researching their favourite wines. They would happily ask for advice and tended to buy from specialist retail outlets. It was speculated that this group might be as large as 10% of the wine buying public, who could be described as very knowledgeable. Mintel in its Wine, January 2001 series put the figure at 5%, and an as yet unpublished study by the University of Surrey at approximately 8%. The difficulty is establishing a single figure is likely to be the differing basis used to define a knowledgeable consumer; some trade wine buyers defined the number as a ‘gut feeling’.</td>
<td>The wine buffs. Knowledgeable and confident, happy to take advice if they perceived that expert advice was available. This was the only group identified as being confident enough to experiment, both under their own guidance and upon other occasions to leave the choice of wines to the sommelier or manager; this level of trust was always felt to be as a result of positive familiarity with the restaurant and its staff.</td>
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<td></td>
<td>It was agreed that this behaviour type ‘tends to fit a typical profile for most FMC categories’ (NWW2).</td>
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Table 5.1: Trade Wine Buyers Identification of UK Wine Consumer Types
It was expected that the new or novice consumers and the wine buffs, in some form would be identified, relating back to mass production and fine wines and high and low involvement consumers as discussed in chapter three (Dodd, 1997: Goldsmith and d’Hauteville, 1998: Lockshin et al, 2001: Beverland 2004). It was also to be expected, given that the UK is an expanding world market, that the trade wine buyers would also identify moderately involved consumers who enjoy experimenting with wine as Christy and Norris (1999) and Ravenscroft and Van Westering (2000) suggested. However the full range of UK wine consumer types relates quite closely to the sophisticated range of consumer types identified by Bruwer et al (2001) and Johnson and Bruwer, (2004), see table 3.2, but unlike their wine consumer market segments UK trade wine buyers differentiated behaviour between the on and off-trade acknowledging the influence of environment and profit margins.

What was unexpected was the UK trade wine buyers identification of the disinterested consumer, buying wine because it’s alcoholic and cheap. They were very very sure that this is a significant segment of the UK wine buying population always buying wine at the bottom end of the price range and preferably on promotion confirming Cheesman’s (2005) view that wine is often used as a loss leader by supermarkets just to get consumers into the retail outlet. When I asked some members of the education department at the WSET why this group of consumers was never discussed in their courses they simply denied their existence, as did one of the wine production companies.

Mintel (2003a) shows that there is significant growth in usage from the first group, 18 to mid 20s, to the second; that the last two age groups have the highest overall consumption rates; and that consumption falls significantly over the age of 60. The trade wine buyers, felt that one reason that there was a high consumption of wine amongst the over 45s was because:

*amongst the older age band as they progress up towards the retirement age [they are], much fitter, much more active than they were, and they see wine as very ... as a healthy part, element of that lifestyle.*
Consumer purchasing behaviours were also seen as being influenced by the seasons and important social events such as Christmas, Mothers Day, Valentines Day, returning from holiday and major one off purchases such as weddings. The off-trade commented that they made about 60% of their sales in the latter part of the year and that consumers regularly traded up for special events.

One new consumer lifestyle behaviour was identified by some of the buyers, that in some circumstances wine was replacing other beverages as the beverage of choice in the home:

*that is something we have found, particularly as you go further north, that wine is replacing afternoon tea. The ladies get together and have a glass of wine, bring the kids out of school and have a glass of wine while they are doing their homework.*

(MGC1)

The trade wine buyers commented that consumers generally have an increasing disposable income agreeing with Thompson and Vourachis (1995) that with the vast range of wine styles and prices available wine could be both good value and aspirational at the same time thus encouraging more consumers to purchase wine for an increasing range of occasions. Most of those working in the off-trade commented upon the increase in home entertaining and therefore the increased home consumption of wine, since a host is unlikely to put a can of beer on the table no matter how pre-prepared the meal is.

In general most of the wine buyers were up beat about the continuing increase in wine purchase and consumption but a number wondered if this sales boom would continue if the youngest group of drinkers and novice wine drinkers did not develop a taste for wine since most of the boom has been created by the same numbers of consumers drinking more. The main danger to wines continued growth was perceived as the FAB market with drinks such as Bacardi Breezers or WKD:
well the anecdotal evidence and the comments in the market place now is that younger drinkers are actually drinking pre mixed spirit drinks and not getting into wine

(MGC2)

NTC Publications Ltd (2000, p. 86) shows that there was a significant reduction in wine consumption by the 18 – 24 age group between 1975 and 2000 particularly after the introduction of FAB’s in 1995. However ACNielsen (2006) and Key Note Ltd (2004) suggest that this reduction has now stabilised and that the amount of FAB’s now consumed within the UK is falling.

5.2.2. Gender

When talking about who actually purchases the wine two opposing, but equally strongly held, views emerged from the buyers employed by multiple grocery chains. The first view stated that men buy most wine:

we do joke about the male crèche, where the women do the main shop and the men sit in the wine aisle ...I used to work for X and they felt that this was a strong thing that came out of their customer research.

(MGC6)

The second view was that most of the buyers are women because ‘in retail terms men push the trolley, women do the actual selection’ (EDM1). Cockburn-Wootten (2002) and Mintel (2003b) show that most shoppers in multiple grocery outlets are women. In specialist off-licences there was a general consensus, based upon company consumer research and the personal observation of unit managers, that the majority of consumers were male. The rationale suggested for this was that:

there’s a much higher proportion of males in the off licence because women do feel a little bit intimidated by that one-to-one scenario.

(NWW1)

The direct mail company had the highest proportion of male purchasers, 95%, correlating with Thomas and Pickering’s (2003a) findings.
Gender based behaviours in restaurants were less obvious because they had to do with ordering as well as consumption in a public place. It was agreed that the vast majority of adult consumers would drink wine with most meals. The trade wine buyers for the restaurants considered that women tended to drink more wine (as opposed to beer or spirits); that the wine would be more likely to be white and to be house wine especially if the group was all female. Those working in the higher quality restaurants expressed the view that men and all male groups tended towards ‘heavier red wine’ (MIRO1). The rationale given was that red wine was more macho than white. This stereotype was confirmed by all of the buyers in regard to on-trade wine drinking in all venues:

\[
\text{start with Bridgette Jones and a bottle of Chardonnay as opposed to men perceiving red as more serious, wouldn’t be seen dead with Chardonnay.}
\]

(EDM1)

Mintel (2001) shows that more women consume white wine, 68.8% of all adult women, as opposed to 63.6% of all adult men.

### 5.2.3. The Influence of Stress, Anxiety and Mood

The trade wine buyers acknowledged that consumers could be categorised into types which would prompt them to approach the purchase and consumption of wine in different ways. They also agreed with Mitchell and Greatorex (1989) that whilst the main buying criterion for most consumers was price at the actual moment of purchase the mood or anxiety level of the consumer could be the overriding factor in the selection of a wine.

#### 5.2.3.1 Stress and Anxiety

The trade wine buyers agreed with Halstead (2002) that there were two main basis for stress or anxiety; it was either timed based, the consumer didn’t want to:

\[
\text{have to spend a lot of time in front of the shelf wondering what they are going to have}
\]

(MGC3)
or image based:

worried about buying the wrong wine...losing face with of friends. (NWW1)

They felt that the stress was related to both excess of choice and the perception of others. All the buyers agreed with Hall et al (2001) that choosing wine can be very stressful in both the on and off-trade but that it was likely to be much more stressful in the on-trade:

dining out is a high stress occupation, concerning financial implications and the fact that if someone else does something wrong you are shown up.

(EDM1)

In other words in the on-trade the consumer may find themselves in a situation in which they are the purchaser but feel unable to control the exact quality of the product they will have publicly purchased; they may, in fact, not have wanted to buy wine, but felt that they ‘ought’ to:

when they’re in the on trade they’re much more pressurized because when you’re in the off trade you can stand in front of the fixture, particularly in the supermarket and you can browse ... when you’re in the on trade particularly if you’ve got a wine waiter or somebody there waiting to take your order I think you are ... the consumer is more pressurized, and there isn’t the same breadth of choice, there’s quite often on the wine list there aren’t the familiar names either, there aren’t some of the brands or some of the wines that you’re buying on a week in week out basis ... even less confident in terms of making the right choice.

(MGC4)

If the consumer was very anxious they would behave like a nervous consumer i.e. ‘people just either played safe [bought a known wine] or house wine’(OIRO2) leaving experimentation for home consumption occasions. It was also believed that ‘most people will read a wine list from right to left’ (NWW3), “what must I spend” then “what will the wine be”. Especially in the up market restaurants there was a consensus that good customer care was essential to gain the consumer’s trust so that a rational fear reducing conversation about wine could take place echoing Olsen et al (2003).

There was complete agreement that in the off-trade it was the size of the range that the consumer could choose from which caused the stress:

so the UK consumer has possibly the greatest opportunity to purchase wine in any country and yet they are still very nervous about the whole process. It’s a bit of a paradox going on really, on the one hand, it’s become established that we need to be
offering in any retail outlet a broader range to demonstrate anything like authority and choice, but at the same time the demonstration of that authority and choice causes a range that can lead to confusion and clutter

(NWW2)

Paradoxically if the range was not large enough the retail outlet was not perceived to be a credible source of wines since as Murphy (2003) and Chaney (2000a) confirm consumers do not want wines over simplifying either:

with wine it's a fine balancing act between the need to make it accessible and de-mystify it but not actually lose the mystique and the authenticity.

(MGC2)

An extreme example of this behaviour was described by one retail outlet manager as:

the classic case is [where the consumer thinks] I don't want to declare what I want to buy in case you [the shop assistant] think that is the wrong thing to buy.

(UCOFF1)

Since the consumer is afraid to explain exactly what they want the shop assistant has to play a guessing game to eliminate those items that the customer doesn’t want so that they can come up with what they would like. An experienced and knowledgeable member of staff may be able to satisfy the customer, establishing trust for future purchases, an inexperienced member of staff is unlikely to be able to do so. This indicates that:

there's a need for a safety element in the purchase because the product tends to be expensive relative to other FMCG categories.

(NWW2)

Safety factors included the use of familiar names, brands, varietals etc, and trust in the retail outlet.

5.2.3.2. Mood

The trade wine buyers identified two primary shopping moods for wine and some other FMCGs which could be divided very generally into 'browsing and bustling' (MGC2). Bustling mode is when time is short, for instance if the consumer is shopping in their lunch hour:
there is a danger that if they're faced with a wall of wine they may actually not buy anything at all ... "ah I've got 10 minutes to get back to the office" and if it's not easy to buy then the consumer will walk.  
(MGC2)

The large off trade buyers highlighted the benefits of promotions and gondola ends where choice is voluntarily reduced and a purchase can be made quickly with little thought when the consumer is unsure or in bustling mode

When the consumer is browsing mode they have time to spend seeking out something special, different or just seeking. Specialist off-licences and any other retail outlet that could provide the right atmosphere and staff to discuss wine with came into their own at this point; the consumer was considered to be wanting to learn as well as to buy and maybe to spoil themselves as well:

*most of our customers only actually prefer being able to browse and wander around and put together a nice range of interesting wines that they can drink at dinner parties.*  
(NWW4)

Trade wine buyers for those multiple grocery chains which had run consumer focus groups agreed that mothers might combine both bustling and browsing mode in their supermarket shops:

*we've had a lot of focus groups and mood is one thing where there is a lot, especially for mothers, they've had an awful day .... they've done the distressed part of the shop, the nappies, the food etc, and the a lot of them described the wine as 'my time -- my shop, my treat'*.  
(MGC6)

One of the direct mail companies commented that one of the advantages, stress reducers, of buying via direct mail or email was that whilst:

*they have a basic amount of information in the mailings ... they have the impersonal but personal way of ringing up a wine advisor and just having a chat and they never need speak to that person again if they feel that they've made a fool of themselves ... but if you've only got a number of local shops and you go in there it can be quite intimidating.*  
(EDM2)

Direct mail and internet companies considered that that this was one area in which they came into their own: most of their consumers bought when in browsing mood:
for instance the mail order brochure that comes with your Sunday papers, you are in relaxed reading mode anyway, you’re actually sitting down there all sort of comfy with possibly a glass of wine already in your hand after Sunday lunch you’re in the mood to take the information in.

(EDM3)

The companies also felt that this would probably explain why their average bottle selling price was between £5.50 to £6.50, almost double the national retail average.

Purchasing mood could also be influenced by memories, holidays being the most significant memory mentioned. A common problem with this was highlighted; if the consumer sought out exactly the same wine, or bought it back with them they found that often when:

you are all on holiday and having a lovely time and are relaxed and the food is great and you are having a ball, it always tastes better than it does when you come back and get a bottle out for Sunday lunch ... and it seldom turns out to be quite what your memory of what it was.

(IWW1)

This it was felt could, and sometimes did put consumers off repeat purchases. Paradoxically, just the act of remembering a place even if wine was not directly associated with that place could also encourage purchases because if the place was remembered fondly then the consumer may seek their wines in the UK upon their return even if they have not bought from this place or country before:

if you’ve ever been to Alsace you feel what a wonderful place, and the wine reflects ...

(MGC3)

This would seem to suggest that whilst wine is a beverage regularly drunk by most adults in the UK, 64% (Wine Intelligence 2003, p. 4), it also has aspirational aspects which all consumers buy into at differing points in their lives and with differing frequencies.

5.2.4. Gifting

Some psychological aspects to wine purchasing were also proposed, specifically where the consumers buying the bottle of wine believed that they were not likely to be the final consumer
of that bottle: if the consumer is going to a party they will buy the ‘cheapest product they possibly can’, (IWW2) because no one will know who bought it and they are not going to drink it; if they are going to a dinner party where the host will have already chosen the wine the consumer ‘will only buy a mid range bottle of wine’ (IWW2): however if the consumer will be identified with the bottle of wine they take they will increase their normal buying price by £1 or so; a dinner part host will also ‘probably add a quid onto their normal buying prices’ (NWW1).

The wine buyers especially those who normally sold by the case identified two other types of gifting. Either the buying consumer would want to buy expensive prestige wines for aspirational gifts where the wine bottle must look good to reflect the image and status of the giver or they would see how many bottles they could buy within their budget:

>a guy pulls up, middle manager or a factory owner. Doesn’t know a lot about wine. His is problem solving; I’ve got £1000 to spend and I’ve got to buy all the lads in the factory some beer and all the ladies I’m going to buy an Australian bottle of Chardonnay and a Chilean Cabernet. That’s what I want ... but it’s got to look good.

(UCOFF1)

5.3. The Physical and Social Characteristics of Wine

This section presents the trade wine buyers observations in relation to the physical / tactile attributes of wine. This includes their beliefs and perceptions with regard to the way in which consumers, including themselves, use wine in a variety of social situations.

5.3.1. Image

Continuing on from their previous comments the trade wine buyers also recognised that the consumers’ purchase of wines was strongly influenced by image:

the only tangible thing you buy when you buy wine is the liquid and the intoxication, everything else that you’re buying is ego enforcement, mood enhancement, status symbol.

(MGC2)
Unlike Lesschaeve and Findley (2004) and Wiseman (2004) who did not consider the situational influence upon wine consumption the majority of the trade wine buyers were very aware of this element of wine purchasing and consumption agreeing with Bourdieu that wine was ‘a way of buying into a little part of a lifestyle that you aspire to’ (MGC2). They believed that the wine bought for any given situation reflected the image of how the consumer perceived themselves or wanted to be perceived in that situation and so could both encourage and deter wine consumption depending upon how the consumer was presenting themselves in particular social situations with peers; sometimes there’s a ‘sort of snobbery image, you think you’re better than us, have a pint of lager’(UCOFF2). They did not comment upon whether or not the disinterested consumer displayed this behaviour although Demossier (2004) confirms that not drinking wine in certain situations is way of maintaining image within certain social groups and situations:

wine is something my dad does and I don’t want to be involved in that kind of situation.
(MGC5)

This particular image would appear to apply particularly to pubs and clubs where, as Mintel, ACNielsen and Drink Forecast figures confirm, sales of wine are very low and are mainly brands such as Stowells of Chelsea or Blossom Hill by the glass.

The trade wine buyers confirmed that, as wine consumers themselves, they also buy differently for different purposes:

a wine that I would buy to take to my in-laws for Sunday lunch would be totally different to a wine that I would buy if I had friends of my husbands coming round who are better off than us ... which would be a totally different kind of wine ..when my girl friends were coming round on a Friday night to watch Friends.
(MGC2)

Many of the trade buyers discussed the point that the positive or negative image of the country of origin could easily affect wines sales, although this did not always have a long term effect; they felt that Australia was a positive image, discussed how sales of South African wines has risen significantly since the end of apartheid, but that as long Spain was regarded as the land of
cheap package holidays it would be difficult, except amongst wine buffs, to sell the new wave of high quality and therefore high priced wines.

5.3.2. Drinking Venue

Key Note Ltd (2002) noted that 85.9% of all wine purchased in the UK was bought in the off-trade and Mintel (2002) shows that of all people who drink alcohol at home about two thirds consistently drink wine with a slightly higher proportion being women. Whilst some of the wine purchased may be given as gifts most was assumed to be for the purchasers’ own social consumption.

5.3.2.1. Food and Wine

There was consensus amongst the wine trade buyers that food and wine go well together and therefore most consumers drink wine with most restaurant meals:

> I think it’s true to say that of all the alcoholic beverages wine actually goes best with food, most wine goes with most food, there is a synergy there which you don’t get with other types of drinks

(NWW5)

Only one instance was cited of it being difficult to match food and wine and this was in respect of spicy Indian foods such as curry. Several unit managers pointed out that at the commercial / ethnic end of the market, pizza chains etc, alcohol sales were as good for ‘beer’, as they were for wine.

5.3.2.2. Pubs and Clubs

Wine drinking in pubs and clubs was seen to be an entirely different activity from drinking wine at home or with food in a restaurant situation and these situations had strong gender connotations.
Physical problems associated with drinking wine in pubs and clubs were identified which even
the head office buyer for the company which sources the majority of the wines sold in pubs in
the UK acknowledged:

_\textit{even places like All Bar One who are trying very hard with their wine selection, it is a}
\textit{bottle that's been sitting in the sink with a stopper in it so it's [not fresh] and I do feel}
\textit{still that what they have available on their list, though its not a bad list, I think it's}
\textit{expensive}_

(MGC2)

That is to say that the choice would be very limited, that the wine was not likely to be newly
opened or served at the correct temperature so likely to be unpleasant and with an on-trade mark
up it would also be relatively expensive.

A final problem highlighted related to some extent to pubs, but specifically to clubs. The 75cl
bottle which is great for sharing at home has three significant drawbacks in the crowded club
environment:
- 'it's a bottle, it's cumbersome, you have to have a glass with it' (UCON2) so how can you
dance with it?
- when the venue is crowded the consumers often get 'knocked and it's just handy to have a
small one [bottle] down by the side of you' (UCON2)
- in most club environments it is not safe to leave drinks unattended because whilst they may
get stolen, more dangerously, they may be spiked.

As a result most club goers need a bottle that is easy to hold, doesn't spill, and where the top
can be kept covered at all times or safety straws fixed on. Some of the trade wine buyers were
aware of this difficulty; whilst some have produced one shot wines such as Waverly's Babe
Chardonnay, Allied Domecq's Montana or Slinky the Blue Nun one shot, others felt that the one
shot wine was so far away from wine's normal usage that to go down this route would be to
damage the main stream image of wine, social group consumption:
do you look at one shot wines but then you move so far away from what wine had done in terms of creating an image that it doesn’t fit with the whole wine market, so it’s a dilemma

(NWW2)

The dilemma is that if wine is not placed into club environments how will the young adults who frequent clubs, the late 20s to mid 30s, acquire a taste for wine? If they don’t move onto wine then there will be fewer new consumers to replace the older generation.

5.3.3. Alcohol Level

Alcohol level was considered to have some effect upon specific groups of purchasers; either those looking for lower strength drinks, usually for medical or driving related reasons, or those consumers particularly amongst the young, disinterested and novices who bought specifically on the alcohol level, the higher the better:

they pick up a bottle check the price, pick the bottle up and then look straight for the percentage label rather than read the back page.

(UCOFF2)

One buyer even recalled having a customer who complained when their usual wine went down 0.5% abv. It was considered that most of the consumers who bought on alcohol level would not consciously recall that wine is an agricultural product and as such could vary from year to year confirming the views of Kalaitzandonakes et al (2004).

All of the buyers who commented on buying for alcohol level agreeing were unhappy with this activity especially as it related to novice consumers. They felt that when a wine reached 14% abv or 15% abv it was often unbalanced and over alcoholic so the novice consumer would not have a good experience when they tried it and may even be put off trying other wines. As Rand (2006) discusses the wine producers are also concerned about this, but often wines win competitions because their high alcohol level makes them stand out and the medals won make the wine more attractive to most consumers. This means that a wine may win a competition
because of its high alcohol level and this may attract a certain type of consumer to buy it, but because the wine is unbalanced the consumer may not find the taste pleasant enough to repeat the purchase.

5.3.4. Taste

The issue of taste was frequently discussed in detail. There was agreement amongst the buyers that most people started off with sweeter tastes and then moved onto drier more complex taste preferences as their palate matured, as part of the general aging process:

*people start with white wine then they move to drier wines, Liebfraumilch to Chardonnay, and then they're now moving away from white wines to red wines, because generally speaking that's what people do because the taste and flavours of red wine are more complex and people generally go for the simple clean taste, are wanting to experience more complex, more interesting flavours.*

(EDM1)

Amongst the trade wine buyers there was a general view that since their potential new consumers were young they would prefer new world style fruit driven wines:

*the popularity of Australian wines is very much to do with the style, it's very much appealing, immediate gratification type of wine, lots of fruit, lots of alcohol so you get an instant hit from it and it's not complicated either because it's all by grape varieties*  

(NWW5)

Certainly most of the top selling wine brands in the UK are New World styles, however their appeal may also lie in the price and consistency of taste rather than taste per se. The trade wine buyers acknowledged that this consistency was a positive motivator for the novice consumer and suggested that helped to explain why some wines, such as Blossom Hill, had moved from the off-trade to the on-trade despite consumer price awareness.

There was speculation that since most consumers are uninterested and or novices buying at under £5 a bottle maybe all wine production would evolve into simple fruit driven wines styles, particularly since whilst there is an unlimited ability to make these styles throughout the world
there are only a limited number of places where classic wines can be made. If most of the wine
drinking population in the UK wanted to drink simple fruity wine would that matter?

If you think that Coca Cola is the biggest brand in the world, and if you look at what that
is, it’s sweet, carbonated, fizzy pop so there’s obviously a taste for that. You could argue
that people just like fruit, so why shouldn’t wine evolve into a fruity drink, within quality
parameters.

(NWW2)

A small number of the buyers did have some reservations about this cocacolisation of wine, but
others felt that:

people don’t necessarily want to be taxed when it comes to drinking a bottle of wine
(NWW3)

Pragmatically most of the trade wine buyers agreed with Lyon (2004) that since many of the
new world styles / brands are very similar and fall within a narrow taste band it is very likely
that the experimenters and the wine buffs would become bored with this simple wine style and
so they would be likely to want to move onto the more variable, sophisticated old world styles
and therefore some traditional and more idiosyncratic styles would always be made:

I think that what we’ll see is ultimately a move away from the standardised new world
fruit driven style ... as people start to tire of that fairly anodised style of wine they’re
maybe going to look for maybe more old world character or just more character in a
wine,

(NWW3)

H anni (2001) agrees with Demossier (2004) in suggesting that the change in tastes may not in
fact take place but that either consumers learn what they ‘should’ be drinking and then learn to
like it or the wine itself changes. Pale cream sherry is the classic example of a white wine
designed to look dry but taste sweet. Complementing this idea Bruce-Gardyne (2006) and
Seguin et al (2006) suggest that some consumers who experiment and try ‘traditional’ wine
styles find that they like them not just because they believe that they should or because the
wines have more complex stimuli than simple wines, but also because over the past ten years or
so these wines have changed, for various technical and climactic reasons, evolved to become
closer to the consumers’ actual taste preferences:
I think it’s the residual sugars that’s in these new world wines is the appeal … can I have a nice dry white, well what they’re talking about is well I don’t want the stigma of drinking sweet wine, but I want something that tastes sweet.

(OIRO1)

One other factor was noted in the debate; that the move from sweet whites was usually to dry whites and then to red wines. The rationale given for this was that:

there is not such a flavour and taste differential between certain whites, because we also tend to drink it chilled and so much of the actual flavours and characteristics [is lost] when you chill something down anyway, so people will tend to develop red wines, or to devote their taste to red wines

(UCOFF3)

There was definite view that fine wines tend to be red, Bordeaux, Burgundy, Rhône, Spain, Italy, classic Australian, with only white Burgundy and traditional German wines being mentioned as fine wines, so that as the wine lover seeks finer wine, wine with a broader flavour range, they will inevitably be drawn more to red wine thus reinforcing the image of red wine as ‘more aspirational’ than white.

This indicates that many of the trade wine buyers were demonstrating reification and that their comments were simply based upon their belief that consumers ‘ought to grow up’ and progress to enjoying Old World styles of wine. However, as Koster et al (2002) and Luckow et al (2005) explicitly show that consumers of all food products become dissatisfied over time with simple tastes and more satisfied in the long term if taste is stimulated by complex stimuli therefore frequent wine consumers will always instinctively move on to look for more complex tastes for physiological reasons. The complex taste stimuli need not be delivered by a traditional Old World wine.

5.4. Business Strategies

In this section the trade wine buyers talked about business strategies actively pursued by their organisations to increase the sales of wine. Some of the strategies identified were specific to
their organisation; some were the industry norm. The buyers also made comments upon the effectiveness, or not, as they saw it of these business strategies both from the head office viewpoint and from the unit managers perspective.

5.4.1. Staff

Three types of staff were identified:

- head office staff who tended to work for large national chains, and whose sole job was the sourcing of wines into the UK either within their company or to other retail outlets;
- unit staff were those who worked for a chain, both on and off-trade, and either managed the whole unit or had especial responsibility for the wine section within the unit;
- owners who managed their business both on and off-trade; wine wholesale, off-licence, restaurant and direct mail.

The head office staff and unit staff commented both on their own and the other in-company role.

5.4.1.1. Staff Training

Various types of training were discussed and all bar one interviewee agreed with Lockshin and Kahrimanis (1998), Hall et al (2001) and Johnson and Bruwer (2004) upon the importance and relevance of staff, especially unit staff, in relation to wines sales and up-selling.

The one interviewee (restaurant owner) who did not think staff relevant to wine sales assumed that his customers ‘probably stick to the same wine’, (OIRO3) since 75% of his sales were house and red, so staff and staff training were irrelevant. All the other owners had a very high level of wine knowledge, wine being a personal passion, however none of them on or off-trade felt that formal training for their staff was necessary. Personal enthusiasm and knowledge of the wines sold in the unit via informal tastings on an ad hoc basis were considered sufficient; all
other queries could be covered by the owner / manager themselves. The only unit staff wine buyer who felt that informal training was sufficient was the sommelier of a members' club.

Amongst the national chains there was a much higher level of belief in the need for formal staff training although at unit staff level this need was recognised much more in the off-trade than in the on-trade. At head office level it was recognised as essential across the board particularly where the potential consumer, a retail unit manager or owner, had a good knowledge of their own:

> in order to have credibility with the trade you have to have a certain amount of wine knowledge.

(NWW1)

These knowledgeable retail unit buyers would not deal with uninformed salesmen:

> you could get a rep in to sell me wine, he was selling baked beans last week because he'd got the right credentials as a rep he'd get the job ... selling baked beans last week, Gallo this week, Mars next week, it's a waste of time.

(IWW2)

All of the national chains, and large wholesalers had formal training programmes for head office staff; usually via the WSET qualification route. Promotion and perception of knowledge by peers was often based upon these formal qualifications. For unit staff, especially within the multiple grocery specialists, it was common for one day in house training to be developed:

> general assistants are never going to be experts, they're never going to be the same degree of knowledge as a specialist, a true specialist off licence, but we can do for them is some basic training and some tools to aid them in some advice things that customers are asking for.

(MGC4)

The specialist off-licence chains all noted that there was the opportunity for all unit staff to take formal training qualifications, via WSET, although the level to which the qualifications would automatically be supported by the company varied by company, length of service and position within the organisation. In the multiple grocery chains a number of unit staff would receive formal training, but their depth of knowledge would be less than for a specialist off-licence, even in those multiple grocers that had fine wine departments and tried to train up one specialist
for each store. This was because off licences only have one product to sell whilst many activities take place within multiple grocery stores:

*in today’s retail environment you have extremely limited pairs of hands, and if the till needs manning or the fridge needs filling up then that has to happen.*

(MGC2)

By the time holidays, days off and sickness had been added in, it was acknowledged that it was simply not feasible for multiple grocery chains to provide the same depth of cover as a specialist off-licence. In instances where the promised training had not occurred the unit staff members were left feeling very disillusioned about their employer and demotivated.

The direct mail company trained all of its staff to a very high level because, as previously discussed, their customer telephone help line was considered to be one of their main advantages over the high street off-licences:

*so they are all on a diploma course if they haven’t already got it ... so whereas you may go into a supermarket and you try to find someone who’s vaguely ... who knows something about wine and you never can, here if you’re talking to an operator and you really want more in-depth information about wine they put you through to a wine advisor and then you can talk and discuss to your heart’s content, so yes it’s a very important part of our service.*

(EDM3)

5.4.1.2. Staff Age and Turnover

Several buyers noted that one of the problems selling wine in the on-trade is that:

*they have a very high turnover of staff in these restaurants, and a lot of people don’t have confidence in selling wines.*

(NWW3)

To try to counteract this problem and increase wine sales several of the wine wholesalers now train their head office staff to provide a service to their customers, the national chains, providing basic training for unit staff focussing on the wholesaler’s own wines:

*that’s something we’ve been doing for the last four or five years, an important part of the service ... you know they have a high turnover of staff in these restaurants so we take along our wines and we get them to taste our wines so obviously it helps us because maybe they will try and sell our wine before our competitors.*

(NWW2)
It is unlikely that the wine wholesaler’s training alone would be able to fully counteract the problem of low unit staff knowledge since high staff turn over, especially amongst front of house staff at the lower end of the market, is often a condoned strategic management policy to reduce staff costs. Lashley et al (2002) suggest that staff training and retention are not a priority for many chain organisations nor for unit managers despite their agreement that knowledgeable staff can increase sales.

As well as high turn over in the on-trade one other problem was identified with regard to unit staff and that was their age, and so own lifestyle drinking habits:

> because we understand that the workforce that we have in the main are very young and they’re not natural wine drinkers, or they don’t seem to be ... so we get them to taste it just so that they’ll be able to say ooh that one’s nicer than that one, even if they don’t like wine they’ll be able to say that one’s not as bad as that one, so they will try and sell that one.

(UCON1)

One aspect of this was that it was generally agreed that where the staff looked young and inexperienced consumers would not discuss wine with them, they would be considered to be ‘order takers not salespersons’ (UCON1), whether or not the member of staff was knowledgeable.

5.4.1.3. Staff Empowerment and Motivation

The empowerment felt by the owners with regard to their employment generally and to their ability to purchase wine was as would be expected, absolute within normal business constraints. All of the head office wine, direct mail and email buyers also felt a significant amount of empowerment as to how they completed their jobs. There was much more restraint noted by the unit buyers of chains, be they on or off-trade all were restricted to a greater or lesser extent in their ability to influence the product that they would present to their customers.
In all on-trade outlets, the range of wines carried was significantly smaller that that carried in the off-trade for both spatial and financial reasons. That naturally restricted to some extent the power / range of activities of the unit on-trade buyer. However that does not explain why all of the unit wine buyers for on-trade chains felt completely excluded from the wine decision making process:

*we have a new menu that comes in every three months, and then they update the wine list. So really we get a list that comes through with the new menu, and we start stocking up. They tell us what to order and then it comes.*

(UCON3)

One pub/bar outlet manager who was empowered to source his outlets' range of beers but had no choice in the wine range speculated that this was because:

*there's only so many beers we can choose from, so many draughts and lager you can choose from and then you've tried all of them, but wines there's so many you don't want to buy in something and selling it for not enough.*

(UCON2)

One on-trade unit manager mentioned that their empowerment might be restricted by head office because they were part of a chain and had to present a consistent image and product. However several unit buyers commented that although the chain may be national, different regions had different wine drinking demographics, confirmed by Key Note Ltd, Mintel and the Drink Pocket Book series, which meant that some products only sold well in certain regions and not throughout the country; they felt that the wine lists were usually put together with economies of scale in mind rather than the actual customer base in the individual units. Most of the unit trade wine buyers in this situation felt that the only way they could influence what was sold in their unit was either not to order in an unpopular item and risk a reprimand or to lobby a large group of unit managers and get them all to make the same request to head office. That sometimes worked and was the limit of their empowerment. It is likely that this constraint reduced their interest in and enthusiasm for selling wines.
The one on-trade unit wine buyer who had given complete freedom to choose the wines for their independently owned restaurant did not feel that he had enough knowledge to do so and had turned the whole process over to his wine supplier. The culture (Chinese) of the restaurant meant that the owners were interested in the food but not the wine which was why they had asked their British manager to take on the task despite his feeling unqualified to do it. This behaviour, the abdication of responsibility for the wine list was frequently raised in relation to Indian and Chinese restaurants particularly where the owner’s culture precluded or reduced the significance of alcohol. From the wine wholesalers point of view the ethnic restaurants tended to ‘buy solely on price alone, they’re not interested in quality’ (NWW3) except the few restaurants at the top of the ethnic market.

In the off-trade the unit trade wine buyers described a much wider range of empowerment including those who worked for national chains. The freedom to choose what wine products were actually available in their retail outlet and how they were positioned ranged from no choice:

they receive a planogram twice a year, they receive an actual planogram which shows them exactly where the products have to be placed and the adjacency, so if we have a trade up opportunity, if there are three wines related to one another, to encourage the customer to experiment. We have a merchandising team which works for beer, wines and spirits grocery and frozen and that team will produce a planogram, so they will work with the buyers to make sure the adjacency looks right

(MGC6)

to some flexibility being available:

they send down a layout, a diagram, explaining the way it should be and as long as I can actually justify it myself; ... because some of them are, well they don’t fit the stores .. I can change it a bit myself as long as I clear it with the store manager, so there is a little bit of flexibility with that as well, everything is open to a little bit of tweaking

(UCOFF2)

to a significant amount of freedom being given:

they give us guidelines because obviously the one thing all good retailers want to do when they are communicating something to customers it’s that magical word consistency ... our [management] like to walk into pretty much every store regardless of shape or
size, and expect that if Chile is on promotion, Chile is going to be by the counter ... so we get guidelines, but it's pretty much left up to us how we merchandise and how we make the store look attractive.

(UCOFF1)

Whilst none of the off-trade unit wine buyers had any influence over the wine buying decisions made by the head office buyers there was a belief that they did have some contribution to make to that decision:

"we don't here at branch level have much influence" [however] 'we are asked for our feedback ... what we tend to do is twice a year have meetings with regional managers and sales directors who would ask us for our feedback on the wine lists and they will trust our feedback from talking to our customers.'

(UCOFF1)

The off-trade unit wine buyers commented that very few of their retail outlets could hold the whole range of the company's wines and therefore the off-trade unit wine buyers even in the most prescriptive chains felt more empowerment than their on-trade counterparts because they had to make some decisions, other than on core and promotional items, about what was held in stock in 'their' outlet.

5.4.2. Wine Range

The buyers were asked about sourcing the wines for their retail outlets both on and off trade. Three buyer perspectives were identified similar to the type of staff identified in section 5.4.1.

5.4.2.1. Off-Trade

All agreed that in the off-trade, unlike baked beans for example, where there would probably be only three choices, a wine range probably had a minimum of 100 choices, and might well run up to 850 choices and over 1000 for the wholesalers. The head office buyers agreed that whilst creating a wine list was not very scientific it could be complex and very time consuming because unlike other FMCGs: 'you have 20,000 Chardonnays to choose from' (MGC1) and
since Chardonnay or Cabernet Sauvignon is such a popular name a sub range of these wines may be needed rather than a single example:

"we look at market trends such as Nielsen ... what we started to do was to plot our range, so we have every Cabernet plotted by price. Do we have Cabernet at £2.99, £3.50, £3.99, £4.99, £5.99, £6.99, £7.99, do we have the wines in the range to fulfil all our customer need."

(MGC6)

It was a matter of finding a balance and then constantly fine tuning; there is a finite amount of space available, and once the original list has been set up introducing a new wine range usually means delisting another wine. Wines could be de-listed for various reasons; exchange rates may change and make wines from certain countries become more or less financially viable; harvests and therefore wine quality may vary from year to year; consumer tastes change and a particular wine may stop selling or a new one may be demanded; plus seasonal demand changes.

A difference was identified between the supply chain from traditional (often European) sources and the newer more recently set up wineries:

"the supplier base is much more fragmented [in Europe] ... and the wine houses have their own definite styles so you can taste straight out of the barrel, but that's how it's going to be because there are only three barrels anyway, and it will all get bottled in that way."  

(NWW2)

These ‘finished’ styles of wines tend to be made in small quantities; just 1,000 cases available perhaps, so suitable for specialist distribution but not across national chains where the minimum order could be for 10,000 cases of wine made to a strict specification. This leads to a high proportion of new world style wines in national off-licence chains of all types and a high proportion of independent estate wines in independent outlets. The independent owners believed that when a traditional generic wine style was chosen for a national chain the wine chosen would be a conservative version of that style and as such unlikely to interest high involvement consumers.
When asked about where they heard or found out about new wines; the most common responses were from supplier, the actual growers and from trade wine fairs or tastings. All of the buyers bar one said that the main buying criteria should be “do we have customers for this?” However there was a caveat that buying should not be only what the consumer likes because:

if you simply purchase what you know your customers like you could easily be accused of ... I think it’s a buyer’s duty or a business’s duty to bring new things to the consumers awareness on this, and also that they’re good.

(EDM1)

One independent wine merchant felt:

that if something’s good then there will be a customer out there for them ... we have to like the wine... a good supplier is better than one customer.

(OIRO1)

Whilst this was the only buyer interviewed who put the consumer at the bottom of the wine buying rationale several of the interviewees commented that there were still rather a lot of ‘dinosaurs’ in the trade, buyers who cared more about wine than consumer requirements although their numbers were decreasing. Since OIRO1 was interviewed two new independent off-licences and one independent wine wholesaler have set up in the area, and the interviewee now has a small selection of wines selling at around £5.00.

5.4.2.2. On-Trade

All the wine wholesalers commented that:

we have certain wines in the off-trade which don’t appear in the on trade and a lot of wines in the on trade that don’t appear in the off trade.

(NWW3)

One reason for this was price; it was assumed that consumers know how much wines cost in off-trade outlets and if they could buy a wine for £5.00 off-trade, they were unlikely to pay £25.00 for the same wine in the on-trade. The second reason was that some wines are only
viable for limited distribution because of limited production and so able to justify high restaurant margins:

there are a lot of wines in our portfolio which are not really off-trade propositions because they’re very very expensive or available in tiny tiny quantities;  

(NWW3)

As previously discussed the unit buyer for the ethnic restaurant bought all their wine from one national supplier who had put their wine list together for them ‘Matthew Clark’ (MIRO2). Most of the wholesalers commented that this was now a normal part of their on-trade business activity along with the staff training, also previously discussed, especially for restaurant chains and in the ethnic sector where wine was not part of the culture:

just supplying the wine isn’t any longer enough ...we have somebody full time who does what we call a wine listing service, and that’s not to say she chooses the wines, but she’ll put together the list with descriptions, will print it for them, and will update it for them, and if they say ‘look at those prices I need to make so much’ we’ll set all the prices for them as well.  

(NWW5)

The advantage for the wine supplier was that unless they did something very ‘foolish’ they now had a guaranteed customer and fairly stable sales volume. Even the independent and chain off-licence outlets were involved to some extent in creating wine lists and ranges for local businesses, both restaurants and local corner shop off-licences: in some cases they also did ‘all the local sort of marketing end for them’ (NWW4). Only two of the independent restaurants and the members club, put their own wine list together themselves.

5.4.3. Customer Knowledge

The trade wine buyers confirmed that those not working in retail outlets had virtually no end customer contact:

well we don’t actually sell to the private individual ... our main focus is with customers, which is the trade basically.  

(NWW3)
and suggested that in most instances the person who compiles the wine list has little idea about what the retail outlet is like, and none at all about their consumer base:

for example one of our bigger customers is a chain of 55 hotels and their lists are agreed centrally.

(NWW5)

Only three head office trade wine buyers confirmed visiting any of the retail outlets they bought for, and only one then spent some time in the retail outlets talking to the individual consumers:

I actually get involved with the customers, I do work in store normally one day a month, which is not a lot I know, but it's probably more than most buyers do. I also get involved in doing quite a lot of wine tastings in store for evening groups.

(MGC5)

One independent wine wholesaler who said that he had good customer contact described his contact as follows:

I'm very much hands on and I like to know all my customers personally and do the business personally, and touch wood, that way we don't get too many bad debts which is always a worry for any business.

(IWW2)

Thus confirming that the wholesale buyers saw the retail outlet owners as their customers and not the general wine buying public. The lack of focus on the end consumer was not restricted solely to the wine wholesalers who realistically could not be expected to know the end consumer. Even in retail outlets most owners and unit managers who said that they knew precisely who their customers were meant that they knew what the customer drank; both in the off-trade, 'we sell by the case so they are fairly discerning customers' (UCOFF1) and on-trade:

I know straight away when some customers come I have to put the house wine on the table, I know that, I know who has what.

(OIRO2)

The lack of qualitative knowledge about who the consumer is and what motivates them to buy was typical; how much and what the consumer spends it on is important, not what influenced that purchase. It would also indicate that Ritzer, (2001), Charters (2002) and Thomas and Pickering (2003a) are correct in suggesting that there is little real understanding of consumer motivation even within the trade.
The only company who was fairly sure they knew who their customers were was one of the direct mail companies who sent out a questionnaire to all of their members annually and whilst it was self selection it and the biannual focus groups meant that this company had very detailed information but even they did not know why their customers were their customers, they could only speculate.

The trade wine buyers from a marketing background agreed with Featherstone (1998) and Williams (2001c) confirming this behaviour and commenting that the more traditional buyers often got so caught up by their enthusiasm for wine that:

\[\text{it's very easy to be completely detached from your customer, to have a very rarified view of the world, to forget how little most people know about wine.}\]

(MGC2)

As one wholesale buyer new to the wine sector, but not to drinks commented:

\[\text{people in the middle, people like us, are very often much focussed towards the vineyard ... the supply chain and almost the last thing they think about is the dear old consumer at the end of the track.}\]

(NWW1)

**5.4.4. Brands**

The term brand was used very loosely by all of the trade wine buyers to identify both actual brands of wine such as Jacob’s Creek, generic brands such as Sancerre and used terms such as Australian Chardonnay as a synonym for a brand; grape varieties such as Merlot or Chardonnay were also used in this discussion. The multiple grocery chains also included their own-brand wines:

\[\text{X's own brands have the biggest share of our total wine sales, it's about 55\% of sales ... consumers have got confidence in the X name they're quite happy to buy X coffee or teabags or nappies or whatever and that same trust, if you like cuts across the entire business.}\]

(MGC4)
The Drinks Forecast (2001, p.189) shows that six out of the top twenty 'brands most often used' in 2000 were multiple grocers own brands. Figure 5.1 shows brand penetration in the off-trade to 01.10.05 for brands other than own brands.

All of the multiple grocery chains except one stocked top selling brands such as Gallo or BLR Hardy as well as their own brands; the exception used their different wines as their unique selling point, however their range was similar and some of the wines were made by the same companies under a different brand name. Independent outlets would immediately de-list any wine product that moved into the general high street retail outlets as they also used differentiation as their unique selling point. It was agreed that the: 

branded market is dominated by new world, Australia and California effectively, Jacobs Creek, Hardy, Banrock, Gallo, they are the key brands and they're doing quite a lot to drive the market.

(MGC4)

There were three main reasons suggested as to why this was so. Consistency, as described by Charters (2004), simplicity in naming and labelling and marketing. The trade wine buyers
suggested that since in the new world there are only a few companies producing any significant amount of wine for export this meant that there were only a few brand names to remember:

_Chile there are maybe 10 big players in the market, Australia's similar with, you know, the big four or five players, um whereas France you just have plethora of producers and the chances of finding the same wine again either in a restaurant or on the shelf are pretty small, so you know you can recognise a brand._

(NWW3)

If each company then sold its wine under the grape variety, as in Gallo Chardonnay, recognition and so the potential for repeat purchases was significantly raised particularly amongst busy, uninterested or novice buyers.

The easy drinking aspect of New World wines was often cited as a reason for the recent rapid expansion in wine drinking and development of international brands. Whilst it may explain their popularity in part, marketing and promotion were agreed to be probably an equally significant factor. As Key Note Ltd (2002, p. 42) shows there is a correlation between advertising spend and brand popularity; in 2001 Gallo spent £2,196,000 as opposed to the £1,861,000 of the combined generic boards of Bordeaux, Val de Loire, French Vins de Pay, Côtes du Rhône and Portugal, and was the top selling wine in the off trade. However even Gallo’s spend was very small in comparison with other FMCGs:

_if you look at the total spend on wine, the total advertising on wine through all mediums is £23 million a year. Beer is £100 million, Coca Cola is £35 million ... £12 million Jamie Oliver at Sainsbury’s campaign or £14 million Sunny Delight campaign. There’s just not the money there._

(MGC1)

It was agreed that branded wines are much more significant in the off-trade than the on-trade, because of consumer awareness of price margins. The on-trade generally preferred to sell wines not available in the off-trade, particularly independent outlets, see table 6.1, and the large new world suppliers were in a position to be able to produce one brand for the off-trade and one for the on-trade. Conversely in the on-trade chains where wine sales are not usually a significant driver it was acknowledged that there was some consumer driven cross over; Blossom Hill
being cited as a wine designed for the on-trade which has moved into the off-trade and Jacob’s Creek which has moved the other way. There was a belief that ‘brands don’t work in restaurants unless the restaurant itself is a brand’ (UCOFF1). It was in these outlets where the wine lists are usually very short that the commercial wine brands were most likely to be found; specifically non-food pubs, clubs and national restaurant chains such as All Bar One or TGI Friday’s.

Some buyers believed that brands can be used to create consumer loyalty because if the consumer liked the lower range they can move up within it quite safely, e.g. the BLR Hardy range:

yet research by AC Nielsen appears to suggest that efforts to keep consumers within one brand are wasted. Consumers are rarely brand loyal ... promotions have a massive effect and sales are largely dependant upon them.

(Aufenast 2002. p. 24)

Other trade wine buyers agreed with Aufenast (2002), Balasubramanyam and Salisu, (1994), Hibberd (2003) and Lockshin (2004b) that brand loyalty is very weak amongst most wine consumers and therefore they need to have a range of different brands to maximise sales potential.

5.4.5. Promotions

The trade wine buyers agreed that the overall quality of wines available has risen considerably particularly at the commercial level. The dilemma in identifying what the price quality relationship is lies in the fact that ‘you can have value for money at 10 francs a bottle purchase or 100 francs a bottle purchase’ (NWW3). They commented in depth about off-trade promotions because, although relatively little takes place in the on-trade, 47.3% of all off-trade wine sales are made on promotion (Drink Pocket Book 2006, p. 48):

a large majority of our sales development is achieved through promotional activity.

(NWW4)
5.4.5.1. Price Promotion and Multibuys

The Drink Pocket Book (2006, p. 49) shows there are two main types of promotion, price reduction (51% of promotional purchases) and multibuys (41.8% of promotional purchases). These two and in store recommendations were the three types of promotion discussed by the trade wine buyers. Since not all promotions are based on price reduction it was suggested that price may not be as important a factor in purchasing as trust in the supplier:

what's proved [this] to me, that the narrowing of the choice is so important, is the fact that wines of the month we don't discount, unless you buy a full case, and they still buy it. Why should they buy it if there were other discounts elsewhere in the shop. It's because it's a big display and it narrows it ... they don't have to think.

(MGC3)

This type of comment was also echoed by others particularly in regard to specialist off-licences and multibuys such as the ‘buy two [or three] for £10.00’ (NWW2) promotions where the wine is only worth £10.00; the customer is:

not buying £5.99 wines which would be the wines which have been promoted down to 5 quid, they are actually buying wine at £5 a bottle.

(NWW2)

Promotions without discounts were not used universally but in those retail outlets where they were used this was as successful as any other promotion. The reason for this was assumed to be that for bustling buyers the wines promoted on the gondola ends meant that they didn’t have to think which wines to choose as they rushed past and for novice buyers choice had been restricted so they could select with more confidence. It may also have been that some consumers thought they were getting a price discount, even though price was not part of the promotion.

Price promotions, where the price of the wine was dropped, were the most popular promotions with consumers. In order for the retail outlet to maintain its profit margin these promotions were generally supported by the wine producer:
we obviously don't have enough fat in the normal price to just say we'll take a pound off, we rely on their [the suppliers] financial help as well. I mean for that we give things in exchange, volume guarantees for a start.

(MGC5)

Only the large wine companies had product volumes and marketing budgets large enough to support such an activity and since these tend to be the New World style producers these are the wines generally be found on promotion:

you can approach those promotional bodies and generic bodies long before they will have set their budgets ... [but]...with Australia I don't really have to go out and ask to do promotions, they tend to come to me saying we want to sell lots of volume of these types of wines and they come and offer you money on a plate.

(NWW4)

All promotions were believed to reassure the novice consumer and speed up the purchase decision for a bustler. Unfortunately it had also created a sub group, price promotion junkies, particularly from the uninterested consumer group.

Much discussion is taking place within the trade at the moment about the consequences of price discounting, how deep and for how long can it continue from Stimpfig (2001) to the Promoting Discussion debate (2005). Whilst there was no disputing that price promotions increased sales, serious disadvantages of this practice were also discussed. The major one was the creation of the price promotion junkies who reduce profit margins and often behave:

almost like a shoal of fish, and whatever Chardonnay is on promotion they go for, so if you look at Chardonnay sales from one country to another it tends to dip according to what's actually on activity.

(MGC6)

Another disadvantage suggested was that one of the ways the wine producers maintain profit margins was to reduce the quality of the wine so that it is only worth the discounted price not the 'normal' shelf price:

they're brilliant, their marketing they appear to offer you wine at half price, and they are brilliant in their presentation, all that sort of thing, if you read Jane MacQuitty in the Times two weeks ago she reckons most of it is pretty poor stuff but brilliantly presented.

(EDM2)
This was despite agreeing that promotions and presentations only work for the first purchase, ‘repeat sales are made if they like the content of the bottle’ (IWW2). The wine producers vigorously disputed this activity, particularly within their own companies, for exactly this reason.

Some of the trade wine buyers also commented on another related but less financially damaging strategy for creating price promotions:

\[
\text{if it's exclusive to you you can put in offers sell it normally at a slightly higher profit margin and then you just promote it out of your own margin.}
\]

(NWW4)

However there was only lasting up-take for a few wines and none of the buyers could explain why these few wines remained popular as opposed to others which did not.

None of the trade wine buyers commented upon the strategy discussed by Beverland and Lindgreen (2002), Cheesman (2005) and Macadam (2005) of deliberately selling some wines below-line in order to entice consumers into their retail outlet and encourage cross over sales for other higher profit margin goods.

Those working in the on-trade commented upon the potential for increasing wines sales but almost always in the context of a food environment because ‘somehow wine is associated with the food’ (OIRO3) and that:

\[
\text{if people like going out and socialising then the chances are at some point they're going to start eating out and eating with friends and you know eating food and consuming wine.}
\]

(NWW3)

The independent gourmet and Italian restaurants agreed that the best form of promotion was ‘word of mouth’, talking to their customer. In pubs and bars ‘happy hours’ set up by head office
were mentioned and the need to develop different wine propositions such as wines in smaller quantities, i.e. by the glass, if sales were to continue to increase.

5.4.5.2. Tasting as a Promotional Activity

Promotions were usually aimed at bustling consumers of all types but when the consumer had more time and felt like browsing, indulging in the 'theatre of the wine' (MGC1), tasting was suggested to be a good selling strategy; wine to taste, someone knowledgeable to talk to and in a buying mood:

\[a \text{ customer will very often taste the wine and buy it afterwards regardless of the fact that it's on promotion or not.}\]

(MGC6)

Having got the consumer to make the first purchase, which they like, they may well be inclined to trade up permanently:

\[\text{the thing again about popular misconception is the people who don't know about wine never spend more than £5 and I think if you can present them with a product that appeals to them, that they like the taste of, that fits with their aspirations and their needs then they will spend more money than that.}\]

(MGC2)

There was however one caveat noted echoing Gluckman (1990) and Goode (2005); the wine used for the demonstration had to be suitable to the time and environment:

\[\text{a Bordeaux wine is not necessarily that enjoyable in a glass at 11 o'clock on a Saturday morning when the kids are screaming ... now if they'd been able to offer you a bit of peppered steak or something ... but if you put a [promotional] thrust, you know to use Hardy's - you know Hardy's Stamp red, it's quite easy to drink, it's fruity, it hasn't got a lot of tannin, it hasn't got complexity and you probably actually think " yeah I'll have one of them, thank you very much".}\]

(MGC5)

Most of the off-licences held regular tastings and in some specialist off-licences there were dedicated tasting counters permanently installed. \textit{Ad hoc} tastings were also mentioned perhaps when the tills are busy and the queues long; a spontaneous seasonal tasting both makes the customer feel more positive and also significantly increases impulse buys, i.e. port at Christmas.
The independent off-licence buyer noted that as well as sometimes mailing their customers, they would hold a tasting event if a winemaker was available to come to their shop:

*the one before we had Geoff Wheeler, one of our Australian wine makers over here to do the tasting, ... so that’s the only other kind of PR we get involved in.*

(OIRO1)

The organisations most involved in actively promoting wine tastings were the direct mail companies:

*the other side of our business which I ought to mention is that we do quite a lot of tutored tastings, we do them for wine societies, we do them for our own customers ... we don’t charge a fee. We provide the tastings, they have to provide the venue and all those sorts of things, they buy the wine and we do the tasting sheets with an offer of the wine, then its worthwhile, but a quorum is about 30 people ... I mean I usually say we’re part of the entertainment business, wine is part of the entertainment business.*

(EDM2)

As Gluckman (1990) and Goode (2005) suggest it is also likely to be worthwhile since the consumers have chosen to go to the tasting and are in positive browsing mood. Very few on-trade premises used promotions or tastings as a method of increasing wine sales and certainly not as a regular feature.

### 5.4.6. Labels and Bottle Design

The buyers were asked about the relevance of labelling and bottle design in the sale of wine since researchers such as Charters have shown that:

*bottle design and labelling are a crucial element in influencing people’s choices of the wines that they purchase, particularly when buying wine for the first time.*

(Charters et al 1999, p 194)

There was a general agreement that the relevance was different between the on and off trade; it was vital in the off-trade particularly for that first purchase:

*if you don’t know anything about the product then you’re buying with your eye, so you’re going along and it’s that label that’s attractive and there are some labels that are very masculine in their appeal and there are others that are a bit more floral or softer and that much more feminine.*

(MGC4)
The label and bottle presentation were acknowledged to be one of the factors considered when deciding whether or not to add a new wine to a range:

say it's a Cabernet Sauvignon of Chile at £3.99 on another £3.99 Chilean Cabernet Sauvignon, but in fact the packaging and presentation of the slightly inferior one is so much better that you know the actual market potential of that one is far greater. It's going to appeal to consumers more and consumers will not differentiate between the two quality levels.

(NWW2)

In the on-trade labels were less important because:

it's important it's well presented but they never see ... but rarely see the label until they buy the wine and it appears at the table because they've bought it from a list.

(JWW2)

This did not mean that the on trade need not worry about the labels though:

if you've got a stylish interior to a restaurant you don't want a dreadful label on your wine bottle however good the wine is in the bottle.

(NWW3)

As with home dining when the bottle is placed on the table and seen by the consumers it has to fit their image of the occasion therefore the wine producers regularly produced different labels for on and off-trade wines. This was not just a matter of image however this strategy also aimed to protect price margins:

they're obviously going to be paying a lot more money ...suddenly the mood changes you want something more traditional and reassuring, so for some wines that we carry, we carry different on trade and off trade labels.

(NWW5)

Whilst acknowledging that after price, bottle presentation could be the final decider to purchase there was no real consensus as to what makes a good label or bottle presentation, it was agreed to be very subjective. Three general themes evolved from the interviews; the wine had to look right for that price range; a classic label indicated a classic wine and a modern brightly coloured 'funky label' a new world style; whilst some humour was acceptable most buyers were very dubious about the quality of the wine in the very jokey wine bottles concurring with Wine Intelligence (2002).
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It was agreed that labelling and presentation would affect the inexperienced buyer the most because:

*if you’re knowledgeable about wine the shape of the bottle won’t mean anything [be of concern] to you will it?*

(OIRO2)

However the trade wine buyers also acknowledged that:

*at the end of the day if a customer comes back and buys the same wine again ... it’s not going to be because he likes the label, he’s going to come and buy it again because he likes the taste.*

(NWW4)

All the direct mail and email buyers laid a slightly different emphasis on visual importance, it had to work both in the pictures in the brochure and then, as Randall (2002) showed, reinforce the image when the bottle arrived in the consumers’ home.

The trade wine buyers agreed with Brochet and Dubourdieu (2001) and Lesschaeve (2002) that the words used on back labels are important but that some of the language was not relevant to the average consumer even if the words used were terms common in the wine trade acknowledging that there is a difference in the symbolic meanings of wine terms within differing wine groups:

*some of the words they didn’t understand are words that are common currency in wine, like structure ...there’s words they didn’t like, like fleshy ... generally they didn’t like pretentiousness and flowery language .. so we actually asked the “what do you actually want to know”, and it was like, I want to know what it tastes like ... and then things like what should you serve it with, how should you serve it, how long you can keep it.*

(MGC2)

One of the younger trade wine buyers interviewed gave a classic ‘textbook’ description of a German Riesling wine; smelling of the petrol fumes found on an old fashioned garage forecourt on a hot day. There are no garages like this left in the UK and given his age there were none when the interviewee acquired his knowledge. This interviewee was demonstrating the elitist language of his cultural group and was unconsciously excluding others from it; including those
who wanted to buy his product; an issue raised in chapter three. It may be that this exclusivity of language is one deterrent to the development of a new generation of wine consumers.

The last part of the wine purchase market where presentation was considered important was gifting; the label and bottle presentation had to reflect the image that the giver wanted to present at the time of giving.

5.4.7. Media

The trade wine buyers were asked how they perceived the influence of the media. Responses were divided entirely into newspapers (both tabloids and broadsheets) and television. There was some note of specialist trade magazines but they were felt to have too small a circulation to have a significant effect except amongst the small group of wine buffs.

5.4.7.1. Television

The trade wine buyers agreed with Halstead (2005) that all consumers were influenced by the media to a greater or lesser extent and the media that was considered most important was TV:

*I always used to notice that if you got a mention on the BBC Food and Drink shop your shelves would be cleared tomorrow, if you got a mention in the Times you’d see a noticeable uptake but if it was in the local newspaper it didn’t really make too much difference.*

(NWW5)

Whilst programmes like BBC’s Food and Drink were seen as very important, it was felt that the whole genre of food and cookery programmes had had an effect in raising consumer awareness about wines. They felt that whilst some of the programme was watched for sheer amusement, *‘in terms of getting gooseberries and all that sort of thing’*, (NWW1) they had significant, if short lived, effect on wine sales:

*the Food and Drink affect was fairly short lived because a week later there’d be another programme and another wine mentioned so that they’d all flock to buy that. You’d always hope there was a residual affect in that if somebody buys your wine because it was*
recommended and then they found they like it they will keep on going back and buying it again.

(NWW5)

Like wines on retail promotion some wines promoted via TV would take off and become very popular but in the vast majority of cases wine sales would sink back to the original level after a week or so. It was also pointed out that because most mainstream TV programmes have national coverage the wines featured were always ones available in national chains or significant regional ones and that almost always these wines were available in off-licences rather than on-licences. In reality only national off-licence chains benefit from any sales increase via a TV programme mention.

Whilst TV was a major influencer there was some discussion about its suitability as a medium in which to advertise and examples were cited of failed TV advertising campaigns. The lack of advertising on TV may be because of the relatively small marketing budgets that wine has in comparison to other FMCG products, such as beers and spirits, it may also be due to advertising restrictions in relation to all alcoholic beverages.

5.4.7.2. Newspapers and Weekend Supplements

The newspaper influences could be divided into advertisements and articles. Comments about advertising came from the head office buyers only but all buyers commented about articles and journalists. With regard to advertising there was a view expressed that whilst the advertisement may not directly increase sales it may increase the company profile especially where purchases were available via email and there was no physical retail outlet in that region. Advertising tended to be either for a generic type of wine such as Beaujolais nouveau or wine was advertised particularly by the multiple grocery chains as part of the general corporate pitch. A good deal for a company was:
it was very good and we also coincided with quite a lot of um press write-ups that we were getting from the wine travellers, so there were some occasions when we got red and white wine of the week in the Saturday Times and right on the opposite pages or in some cases just below the articles there was one of our adverts.

(NWW4)

The down side to this was that if an organisation did manage to get a write up, and they had an advert in the same paper they could not properly monitor which had the most effect on sales:

so even if you've got Jane MacQuitty on one page and your Sunday Times offer on the other page it doesn't ... there's no correlation.

(EDM3)

The trade wine buyers commented that the two specialist off licence companies who had the highest press profiles in the press both have:

dedicated PR person to get wines to journalists as and when required to journalistic requirements, i.e. photo deadlines.

(NWW4)

There was a consensus that press articles worked best if they appeared in the paper of the consumer’s choice and / or if they were written by a well known personality that the consumer happened to like:

unsurprisingly the things that work well for us in terms of growing sales for you are recommendations from people like Jilly Goolden or perhaps from the Mail... if the Daily Mail is your paper of choice then you feel it speaks to you ... so if it recommends a wine then you think 'well I'll like that wine too'.

(MGC2)

It was agreed that it wasn’t always articles written about wine which could have an effect on wine sales it was the image portrayed in the media generally; positive reports about Australia and Paul Hogan could increase Australian sales; the 2005 film Sideways had increased sales of Pinot Noir and reduced sales of Merlot based wines, especially in the USA.

5.4.7.3. Wine Journalists

Most buyers did not have a very high opinion of the majority of wine journalists:
a lot of the press are only writing for a very small percentage of wine drinkers... there are obviously some that have got the format right and consumers are trusting in what they are saying ... and there are others who are probably not having very much of an affect at all and just putting their own opinions in the paper and not really thinking about the average consumer in the UK.

(MGC4)

However, wine journalists were courted because of those few who worked for the nationals and weekend supplements whose effect was acknowledged to be significant. The buyers generally cited the Saturday and Sunday papers as having the greatest effect with the Mail, Times and Financial Times being mentioned specifically. Influential personalities mentioned were Jilly Goolden, Jancis Robinson, Malcolm Gluck, Clive Coates, Jane MacQuitty, Hugh Johnson. The objectivity and value of journalism is currently being debated in the trade press itself (Jefford, 2002).

The independence and integrity of wine journalists was also questioned:

I'm very suspicious of the British wine press because I spoke to the Chairman of the Circle of Wine Writers, a chap called XX, now I said to him why is it you guys never write about Italian wines? His answer was because they don't pay our airfare to go out there. How can you be objective when your airfare is being paid for you, your hotel bill and all your restaurant bills?

(OIRO1)

The direct mail and email companies felt that the media had little direct affect upon them. The reason for this they felt was that:

because of our customer base only X percent are going to be reading that newspaper or article or whatever, whereas if we send it out in our mailings then 100% of the customers ... will be reading that recommendation.

(EDM3)

As discussed previously the effect of the media and journalists in particular was also called into question with regard to wines which won competitions. There was a very strong view that many of the wines which won and were then written about were not in fact good wines but had been made specifically to win the competition and attract positive publicity:
these trophy wines, these big brands that produce this wine that will win all the trophies, and all that stuff, I find it very disturbing ... they’re making wine for the journalists they’re not making wines to drink.

(OIRO1)

There was though a view that even if what the journalists wrote did not have a significant effect upon wine sales, the knowledge of specialist wine journalists was still worth seeking out and could be useful to the trade wine buyers:

that’s not to say that it’s not important to also develop relationships with specialist wine journalists, because they’re also a very important source of information for us as well because they travel all over the world all of the time, and they come back and think there’s this amazing thing here and amazing thing there and all this is going on.

(MGC2)

One last point noted by some of the buyers was a feeling that whilst one wine journalist was not likely to have a significant and lasting effect upon wine sales if they all started writing about a product, style of wine, grape variety, a health potential etc. then they could start a trend and have an indirect influence on sales on a long term basis:

they either get behind or they initiate trends, and I put the success of Albarino now on two things. One is in the Financial Times on Saturday Jancis Robinson, who’s extremely influential, she really got behind it and spent one of her Saturday mornings writing about nothing but this obscure grape, the Albarino.

(EDM2)

5.4.8. Direct Mail and Internet Specific Strategies

The trade wine buyers for the direct mail and internet organisations made comments on business strategies which were specific to organisations which do not sell from a physical base. The direct mail companies commented on two aspects; firstly the importance of the brochures and photography in the sales of wine:

if they’re not tempted by a picture of a bottle of wine then they’re never going to respond.

(EDM2)

Secondly they discussed the amount of business which they actually conducted over the internet; only about 5%. They speculated that low take up might be because the current wine buying generation were not brought up with the internet and so it was not their medium of
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choice or more probably because their consumers would rather be sitting down with a glass in one hand and the company’s brochure in the other than:

*to repeat at home the actions which I do all day at work, which is staring at a screen.*

(EDM3)

Quinton and Harridge-March (2003) suggested that it was more likely to be due to the quality of the websites themselves.

The multiple grocery chains agreed that whilst internet shopping was still small, only 4.5% in one case, the bottle price of internet purchases was always higher than the normal in-store average. It was speculated that consumers who order via direct mail or the internet are more affluent home owners, are browsing when they buy and so spend more.

One independent off-trade buyer commented that via the internet they had become an ‘international business’; most of their email and internet customers had originally been customers in their shop who had then moved away from the area and used email to continue to buy from them. This would also support Quinton and Harridge-March (2003) perhaps developing their work to suggest that the familiarity and trust which had been built up in the original real-time purchases develops more successfully into electronic purchasing than where this trust has not been established.

For those who used the internet it was agreed that it was a useful promotional tool because special offers could be kept up to date in a much more effective way than with any kind of mail shot and the information given was very detailed. They also suggested the number of hits or enquiries meant that they could alter and tailor the company’s wine range precisely:

*if I find a clump of people looking for certain things ... browsing certain areas then we can say right we either need to expand or investigate why people are looking at these area.*

(EDM1)
5.5. Summary

The data collected from the Trade Wine Buyers introduces several paradoxes, for example; many wine consumers are not interested in what they buy or consume; large volume brands can both attract and repel certain groups of consumers; the extensive range needed for credibility may cause fear and stress in the wine buying consumer; some promotional strategies have created a group of consumers whose buying behaviour is detrimental to profit margins; some trade wine buyers are aware that they have very little knowledge of their end consumer, very few seek to increase that knowledge. There was agreement that buying particularly in the on-trade was a very stressful situation yet some unit managers felt a serious lack of empowerment and interest in the wines they were to sell. This created a vicious circle in which staff with a lack of knowledge, confidence and interest could not assist their consumer adequately.

The consumers spend was considered to be the most important, if not the only, piece of knowledge that the trade needed to have about the consumer. However the trade wine buyers identified two significant threats to the continuing sales of wines; potential rival drinks, such as FAB’s and enormous world over supply of wine, both of which have the potential to reverse the current increase in UK wine consumption. There was also little understanding of taste, i.e. that frequent consumers might change to complex wine styles simply because they would naturally become dissatisfied with simple taste stimuli rather than that all involved consumers consciously aspire to drink elite wines. The buyers also identified that whilst consumers may primarily belong to one behavioural cluster they will frequently move into another as the reason behind the purchase changes. In some clusters wine prices are increased and some decreased.

Few companies had any intention of trying to analyse the motivation of the consumer and most current market research analyses consumer groups in isolation without reference to access to wine or the other physical barriers to purchase and consumption identified in this chapter.
# Chapter Six

## Results - Wine Producing Companies

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Chapter Six

Results – Wine Producing Companies

6.1. Introduction

As discussed in the methodology the interviewees were not actually wine producers themselves but employed by major international wine producing companies in a senior European marketing capacity. In this chapter, and subsequently throughout the thesis, these interviewees are referred to as wine producers because they were interviewed as significant representatives of the wine production world.

6.2. Consumer Types

Despite saying that their companies were involved in qualitative research into consumer preferences there was little mention of types of consumers and one wine producer had not even considered that there might be consumers who drank wine but were not interested in it. He said that he had never seen any research into the uninvolved low purchase price consumer because ‘we’re not interested in selling wine at £2.99 a bottle’ (WP3). The company WP3 represents is involved in multiple grocery price promotions. Since the average selling price of a bottle of wine in the off trade is approximately £3.75p (Key Note, 2004) there is obviously a great deal of wine sold below this price; as Bruce-Gardyne (2005) discusses:

well over three quarters of the wine retailing in the UK pings through the till at under £4.00, primarily thanks to the level of discounting in the trade.

(Bruce-Gardyne 2005, p.30)

Another wine producer was aware of a range of types of consumer and commented that:

at one end we’ve got people we call no fuss and they’re the people who wine is probably third on their list of alcoholic drinks so it’s not important to them. They really don’t care about brands or anything like that. Then we’ve got the next entry level which are just basically heavy wine drinkers, they care about the brands, they care about what country it comes from possibly, they do care about the grape variety but beyond that they don’t care... they just want to know that when they open the bottle it’s going to taste nice and their friends will like it, no more than that.

(WP2)
This wine producer estimated that ‘probably 40 – 45%’ of consumers in any wine market ‘just enjoy it for what it is, it’s just a nice drink to have and it just helps them relax’ (WP2).

Some of the trade wine buyers and wine journalists had questioned whether young people would move on into wine. The wine producers were also aware of this debate but generally agreed that wine consumers were becoming more sophisticated and as long as the aspirational aspects of wine consumption were retained the next generation of wine drinkers would evolve:

the only risk, the longer term risk could be that a generation of young people, ... the debate was does wine need to sell itself to the younger generation? You can debate that either way. I think personally that as long as wine continues to evolve, continues to modernise itself sufficiently but still retaining the aspirational qualities which has made it so popular to date, as long as that continues to happen the younger generation will move away from alcopops and coca-cola into wine at a certain stage of their life.

(WP3)

Paradoxically some wine producers suggested that there were also logical reasons for the ‘coca cola-isation’ of mass consumption wines:

I think all the brands like Jacobs Creek and like for us Lindemans our aim is to become, I guess a bit like Coke, consistent around the world maybe slightly different for some of the markets where there’s a different flavour profile required but there’s a bit of a snobbery in wine, where people say you don’t want to be everywhere because people think it devalues it, but actually for most people drinking wine they do want to see the same thing because it’s all about trust.

(WP2)

This question of providing reliability, safety and trust via explicitly branded wines on the one hand and the need to retain discovery and aspirational aspects of wine on the other within very small price points was a constant underlying theme of the interviews.

6.3. Differences in Mass Market and Quality Wine Production

All the wine producers agreed that almost all wines from entry point up to around £4.99 would be brands and explicitly marketed as such. However they gave no indication as to at what point wine stopped being just a beverage and became a cultural product, something aspirational or even fine. To date academic researchers (Charters and Pettigrew, 2002: Charters, 2004:
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Beverland, 2004) have not identified this break either but since the wine producers were aware that branded wine is a mass consumption product marketed as such and that aspirational and fine wines need to have an element of discovery and uniqueness in their image, it had been expected that the wine producers would have been able to identify the different types of wine other than by price.

The wine producers agreed that wine is fractionally tailored to the UK market but considered it a fairly normal FMCG practice since wines:

\[ \ldots \text{such as the Hardy brands are made in Australia and then shipped to international markets and certain styles of those branded ranges might find their way into the UK and others to Asia and the taste profiles of those particular styles within the ranges would be tailored to those markets... Hellmann's Mayonnaise in the US is different to Hellmann's Mayonnaise in London which is different to Hellmann's Mayonnaise in Australia and that's because they've optimised it to each market's requirements.} \]

This resulted in some wines at the mass market end having the same name but a slightly different taste in different continents; standard practice in other consumer goods. Wines made to higher quality and price point levels did not have this tailoring because it does not suit the product which sells itself on its artisanal aspects; terroir, vintage authenticity and uniqueness, for example.

The wine producers agreed that for the large mass produced wine brands their companies were now starting to use qualitative research methods including limited use of consumer focus groups (Wiseman et al, 2004) to taste wine in development so that new wines were developed to match specific target groups of consumers, a practice long used in other FMCG categories but relatively new to wine:

\[ \text{we are looking at sensory development of wine rather than just straight what the winemaker thinks it should be... we've got lots of different wines to work from ... it's quite a technical way of doing it and it takes away a lot of the art of what you get in more premium wines, but in a more commercial level its probably the way we will be developing wines in the future. It happens in all the food categories, it happens in lots of other industries, wine's probably twenty years behind other markets} \]
Once the mass market wine has been successfully developed it can be made from a variety of sources which enables it to retain the same taste each year:

*one in particular, which is one of the major selling brands in the UK, Stowells, is actually filled in the UK. So it's produced all around the globe, different source locations, and then shipped and bulked to the UK where it is filled and sold.*

(WP3)

However, reflecting Simpson et al (2004) and Brown and Getz's (2005) work, once wine is made for a slightly higher price range, around or just above £5.00, the wine needs to appeal to the consumer’s subconscious

*we learnt a lot about what the consumer subconsciously thought about wine and one of the areas that was very strong in consumer awareness was that wine was a natural product and whilst some of their conceptions were a bit off the mark in terms of reality, there was no doubt that this resonated very strongly.*

(WP3)

There was agreement with Lyon (2004) that the majority of wine sold is sold to the ‘mass market’: mass market wines were defined as being under £5.00, specifically up to £4.99. One wine producer estimated that their production of mass market wines was about 85% of total production and that this was a fairly normal percentage for all of the big companies; Mintel (2005) shows that 89.3% of all wine bought for normal occasions in 2004 was purchased for less than £5. The wine producers identified the next price range as being between £5.00 to £8.00, a market which was small but growing and one they wanted to develop. Wines selling for above £8.00 in the off-trade were considered to be aspirational, possibly iconic, and part of a tiny specialist market; less than 1% of the normal occasion wine market although over 10% of the special occasion market, (Mintel 2005).

### 6.4. Brands and Brand Ladders

All of the wine producers confirmed the work of Chaney (2000a) and Aufenast (2002) that wine buying and consuming is an emotional process which is very occasion dependant; dependant upon the location, the reason for drinking and others present during the drinking, therefore ‘*in that sense [brand] loyalty is a bit of an enigma*’ (WP1). This confirms the findings...
of the Vinexpo Studies (2003) that unlike all other FMCGs there is very little brand loyalty. As a result each company had developed a system of brand ladders within which it was intended that the consumer would move:

*with a brand in wine you’re never going to appeal to everybody with the same product because of the occasion, because of their different level of sophistication, their different level of knowledge, their different level of comfort and their different level of rational needs as well. ... so we try to develop a portfolio of products that meets all different needs ... [and] ... within brands we are going to need different price tiers to appeal to different occasions and different consumers.*

(WP1)

So that although the consumer believed that they were buying a different product, they were still, if the pitch was right, buying from the same company. This agrees with Balasubramanyam and Salisu (1994), Knott (2002) and Hibberd (2003) that economies of scope are commonly practised within the wine production industries:

*the process I’ve described as optimisation is a very very big process and I don’t think you’d do it unless it’s a big part of market.*

(WP2)

Not only do the large wine companies make wines of the same name with differing tastes for different markets but they make very similar wines differently labelled for the on and off-trade as well as making wines from a similar ‘family’ so that consumers can move up and down the name in safety, i.e. Lindemans Cawarra, Bin Series and Reserve Label ranges. Each international wine producing company repeats this process across different brands and different countries. All of these wines are marketed in the consumer’s perception as different products so that the wine producers could and did say that there is a huge variety of wine on the shelf, ‘700 to 800’ wines, at a wide range of prices. As Lockshin (2004a) identifies the wines were actually produced by a handful of companies and at the mass consumption level to a very similar ‘Australian’ formula. One of the:

*best brands in my view [for the uninterested consumer] ... is Blossom Hill, it’s just red Blossom Hill, White Blossom Hill and rose, and they’ve been incredibly successful with that. I think that they’ve been successful because they have demystified it, they have made it the coca-cola of the dinner table for food ... not trying to be sophisticated, they’re just offering a beverage.*

(WP1)
In contrast the wine producers also acknowledged the paradox discussed in previous chapter about the ‘natural’ image of wine:

*people still like to see wine as a craft, as a small industry and if you start selling yourself as this great big number one world wine ... it goes into all these negative connotations of mass industry and stainless steel tanks and no care and attention and no craftsmanship and all those sorts of things.*

(WP2)

This was part of the rationale for marketing each brand as a small ‘independent’ range but led to the problems of small marketing budgets identified by Julian Brind\(^5\), Senior Wine Buyer for Waitrose (quoted in Aufenast, 2002) and Key Note Ltd (2004).

The wine producers suggested because they were continually seeking to create new products for the market to gain competitive edge that:

*we are the innovators rather than the quirky people, the tiny producers, who have a limited fertility to produce just what they produce.*

(WP3)

And that those people who complained that diversity was being lost should reconsider because small producers could only afford to make a small range or single wine product and make that same product year after year whilst the large wine companies could afford to experiment and create new wines:

*what happens is that as the big get bigger it opens the opportunity for the niche producer, who by definition has to sell more expensively to sell their products to a market that is evolving,... so it's self regulating. You never find a situation in which those people are all forced out of business, because inevitably it creates a vacuum which is filled by somebody else. What has to happen is that the niche producer has to understand that they need to evolve as well and there are many different markets at different price points within a market like the UK and many different ways of selling the product, for example, mail order, it's a growth business and that too offers a way for more interesting different smaller parcels from smaller producers to be bottled. You can take the retailer, the smaller chains such as Waitrose for example and though they have big brands they also have quite an interesting and good selection of wines from medium sized producers, so at all levels it's sort of self regulating.*

(WP3)

However, as Goode points out, this is too simplistic in that it suggests that small producers will get listed in national chain outlets or other nationally available outlets along with the higher
quality brands produced by the largest companies so that less experienced consumers deciding to trade up will have real choice. Instead Goode suggests that it is:

incorrect to see the two wine models (or ‘cultures’) merely in terms of cheap versus expensive wines. The danger for producers not part of the wine-as-FMCG club is that when consumers choose to trade up from the sub-£5.00 brands they won’t turn to authentic estate-bottled £10 wines offered by specialist independents but they’ll stick with the supermarkets and opt for the £10 brands

(Goode 2004, p. 41)

Real choice will be diminished because the number of small to medium sized producers able to gain access to the national chains will be reduced as the trade wine buyers for the wholesale companies conceded.

6. 5. Labels and Presentation

Labels were not considered as important in the on-trade as staff training and sales skills but were considered vital in the much larger off-trade sector because ‘we all buy with our eyes’, (WP3). There was less consensus as to what makes a good label,

[the] most important thing is the immediate impact, label impact and then people need to know what they’re buying, so the grape variety, the brand and it’s positioned anyway within the country of origin so the country is actually less important because it’s in that sector anyway

(WP3)

Key to appeal on label absolutely is simplicity. So an easy to remember brand name, so don’t use French or things like that doesn’t help, varietal labelled or very clearly labelled so this is Chardonnay, Sauvignon Blanc, Shiraz makes a huge difference.

(WP2)

However they did raise the point about the difference between ‘quirky’ names and classical names. There was a view that if the name was too jokey the wine may well not be as successful as it could have been because a section of the population would have been put off trying it. This point was also made by Wine Intelligence (2002). One wine producer commented that ‘what’s weird about the consumers is that they will accept modern labels provided there are enough

5 Retired in 2005
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classic elements.' (WP3), a comment backed up by WP2 ‘good quality cues in there so use of
gold, classic fonts and so on they make a difference’ and Lechmere (2005).

6.6. Marketing

For the iconic wines, such as Grange, ‘word of mouth and experience’ (WP1) were considered
to be the most effective if slowest forms of marketing and these wines, if advertised at all, were
advertised in very specific media along with ‘perfumes and luxury goods’ (WP1). For all other
wines it was agreed that television was the most effective marketing media confirming the work
of Halstead (2005). However all also agreed that it is a very expensive media and therefore, as
Brownlie (2005) discusses, very difficult to justify for a low margin fragmented product like
wine:

in wine, even more so than other alcoholic beverages, wine is probably a little bit
“backwards” in that it is very fragmented in a category food context. Big player in wine
has a three or four [percent] share of the market, laundry or toilet tissue, or washing up
liquid a big share of the market for a producer might be 30 or 40 or 50 or 60%
. Pampers
has a 60 share, Fairy Liquid has a 50 share, Ariel has a 30 share type of thing. To have
big players with 3 [percent] shares just gives you the context that it is incredibly
fragmented, lots and lots of different producers, and as such you don’t have as much
scale so the amount you can spend on research, the amount you can spend in marketing,
is less because you don’t have as big a business to equatise that area if you like.
(WP1)

The wine producers also agreed with Christy and Norris (1999) and Randall (2000) that one of
the paradoxes of wine was that:

if you are advertising a 30 second [TV] commercial saying that this wine is better than
this wine, it's a bit counter intuitive to the underlying consumer need in the category
which is for experimentation and discovery. You like to feel like you're discovering wine,
and there's a sense of cleverness in the choice and a sense of fun in the choice
(WP1)

Consequently most direct television advertising was for commercial level brands or as part of a
general package to the consumer:

wine is not a high margin item and therefore with very few exceptions and very few
occasions will you see wine being advertised in the media, except where its associating it
with an offer in a retailer.
(WP3)
The wine producers agreed that sponsorship of TV lifestyle programmes was a more effective way of raising consumer awareness; it brought the wine name to the consumers’ attention without causing discordance with the image of wine per se:

> we certainly find that there’s a direct correlation between purchase intention and purchase habit and brand awareness. So the more you can make the brand top of mind, even without a salient message something that gives them a reason why, just simply getting the brand top of mind is the highest correlation to purchase behaviour.

(WP2)

This type of promotion was acknowledged to be in its infancy, and ‘a long slow burner’ (WP3), so although the producers were sure that it had shown itself to be an effective media they agreed that it would not cause the sudden short term rushes in sale that appearance on BBC’s Food and Drink programme had in the past. Interestingly none of the wine producers mentioned the current BBC TV programme Richard and Judy’s Wine Club but they all mentioned the defunct BBC TV Food and Drink programme; behaviour repeated by all of the other interviewees in this thesis.

Since supporting TV lifestyle programmes was expensive and not fully proven ‘promotional activity in store’ (WP3) as suggested by Rink (1998) was seen as a more effective medium than direct advertising; however as discussed by Chaney (2000a), Aufenast (2002) and Hibberd (2003) this produced:

> a dichotomy here between supporting the distribution that is so important to get the brand sold in the volumes necessary and the brand aspirations in terms of image and added values.

(WP3)

There was acknowledgement that there are two audiences for wine media; the trade and the consumer. When the wine producers wanted to get their product in front of the trade then the trade press was an effective media, much more so than the consumer press was for consumers:

> In the wine world the producer, brand owner has to get past the gatekeeper, the distribution and therefore one has to influence the gatekeepers, the buyers, the trade buyers and therefore trade press of one kind or another is an element in that process and therefore that’s quite important.

(WP3)
The wine producers did not consider the written media per se to be very important in terms of the consumer:

*I think the broadsheets are quite effective and certainly it’s a way of getting the brand in front of target group consumers because of the way the broadsheets target their audiences. But I wouldn’t wish to overstretch the importance of media, because it is one element but it’s not the major element that is used.*

(WP3)

The wine producers confirmed a point raised by the wine journalists, although from a different angle, that well known brands were not really suitable wines to write about to interest wine consumers:

*The issue with the wine writers is that they have to fill column inches each week and if they wrote about Lindemans or Jacobs Creek or Hardys who everyone knows about week in week out week in week out their job is redundant and they have to find new pieces of news and it makes it very hard for big brand owners to get any access*  

(WP2)

Halstead (2002) and Olsen et al (2003) showed low involvement consumers, the main consumers of mass consumption brands, are not particularly influenced by written media in newspapers; high involvement consumers do not seek information about these brands.

Like the wine journalists the wine producers felt that direct written media influence was decreasing and that where wine was written about it was increasingly part of ‘lifestyle’ and linked to food:

*wine writers are still important but if you look at the focus wine writers have got in the national newspapers now and magazines versus 5 years ago even 10 years ago, it’s been marginalised and limited and limited, much fewer column inches dedicated to wine than there was in the past. Pure wine, there’s a lot more column inches dedicated to food and wine and matching and that sort of stuff so the likes of Jane McQuitty and Jancis Robinson and all those writers are, I wouldn’t say on the wane, but certainly they’re less important to us. We know that if Gordon Ramsay said I serve Penfolds Bin 28 or wherever, it would make a big difference and probably more of a difference than Jancis Robinson because for most people no one knows who Jancis Robinson is or Jane McQuitty or whoever.*

(WP2)

They agreed with Dodd (1997), Lockshin et al (2001) and Beverland (2004) that where wine journalism was important, beyond providing valuable point of sales information, was for high involvement discovery consumers and top-end connoisseurs.
The wine producers confirmed that part of the public relations aspect of their promotional activities was:

*trying to influence people like Tim Atkin, trying to influence people like Jancis Robinson,*
*trying to influence people to write about our brands in a positive way, because a lot of consumers will use those people as their recommendation. Those people write about brands, people will trust that as good information, “I can trust that brand.” ... [then] use the in-store environment, so point of sale, we’ll try and put wine-writer endorsements at point of sale, saying Matthew Jukes recommends this, or Gold Medal from Vinexpo Wine Fair, try and when the consumer is choosing the product in the store environment giving them a reason to choose our brand over another,*

(WP1)

Point of sales information as confirmed by Chaney (2000a) and Wine Intelligence (2002) is considered to be one of the most effective promotional tools given the percentage of consumers who make their final decision when actually standing in front of the rows of wine.

This identifies a paradox that the wine producers seemed unaware of. Whilst the wine producers did not feel that wine journalism per se was a particularly significant form of promotion endorsements from wine journalists were considered to be excellent material for that significant influencer, point of sales information.

6.6.1. Price Promotions

The wine producers all agreed with Penn and Christy (1994) and Howley and Myers (1998) that the balance of power is with the multiple grocers where about 80% of all wine is purchased:

*Tesco, you’ve got to work with them or you’ll lose, they’re 28% of the wine market so if we don’t play with them we’ve missed a big chunk.*

(WP3)

They did not agree with the trade wine buyers suggestions that as a result of this fierce competition to get listed by the multiple grocers the quality of the wines regularly promoted had gone down. There was some acknowledgement that this may have happened in the past when these major promotions were still a novel idea and the wine companies were not able to
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immediately conjure up ‘another 2 – 300,000 cases’ (WP2). While some felt that it might still
be going on in some other brands all agreed that since margins were so low for their wines on
promotion the maintenance of quality was vital if the consumer was ever going to buy the wine
when it came off promotion therefore it was other costs that had been reduced:

advertising support other than promotion that has been hit. I’d say overheads and I’d
say packaging. If you look now there is a lot more products without a punt, you know the
bottom, there’s a lot more products without a punt which is added cost, there’s a lot of
thinner glass products which takes costs out. The quality of the labelling has been
reduced, the quality of the packaging has been reduced. So there’s been an awful lot of
effort in reducing cost, but I’d say the one thing where people are putting more and more
money in actually, more and more effort in quality has gone into wine, and that’s because
there are two or three or four or five big players now who really are fighting for share
and the one thing in wine above all else is if you try a bottle of wine and you don’t like it,
you don’t buy it again and so there’s been a real focus. I think if you talked to every
major producer their number one strategy would be better wine at the price. So I think
the one area that hasn’t been done down is wine quality.

(WP1)

Stimfig (2002), Muir (2005) and Macadam (2005) suggest that very few price promotions ever
break-even and that these price promotions are unsustainable except for very large companies.

It was suggested by the wine producers that between 60% and 90% of all wine was sold in off-
trade chains was sold on promotion and whilst the wine producers acknowledged that without
participation in price promotions they would not be listed in the multiple grocers, the
interviewees all felt that ultimately it was a bad thing for all concerned because:

it does devalue the role of brands, it does devalue the category for everybody and it does
create more and more people who buy on deal. In retail now, a lot of people don’t even
walk down the wine aisle, they just buy what’s on the end, because they are now
trained... anything that hasn’t got a price [reduction] on isn’t shopped anymore

(WP1)

This confirms the views of both the trade wine buyers and Stimfig (2002) and Macadam
(2005) that this strategy is producing a group of consumers who buy on promotion alone:

not really caring whether it’s an Australian Chardonnay or a Chilean Chardonnay or a
South African or whatever it is.

(WP2)

Since these consumers only ever buy wines which are on promotion the danger is that if price
promotions stopped being supported by the wine producers these consumers might stop buying
wine altogether and move onto another alcoholic beverage being sold on promotion, such as lager. If they want to remain in the UK mass wine market the wine producers accept that:

*the retailers are not going to walk away from price promotions, it’s a key part of the way that they compete and we as businesses have to accept that.*

(WP2)

This reinforces a point made by the wine journalists that the large companies are able to rotate promotions through their ranges and brands so that whilst they will usually have some wines on promotion they will also always have other wines which are being sold at full price, balancing out the margins to some extent. A small company would not have the range to be able to do this.

### 6.7. Opportunities for Growth

#### 6.7.1 Overview

All the wine producers considered the UK market to be extremely important, because of its size, *‘it’s the second biggest market in the world, and it’s significantly bigger than any other market outside the US’* (WP1) a point also confirmed by The Vinexpo Studies (2003) but they felt that growth would level off in the near future dropping from double to single figures so that their companies would need to look for other areas of growth, generally identified as Asia, particularly China, and the USA. One wine producer commented that:

*already the margins that are coming out of our UK business compared to almost every other business in the rest of the world are lower and that’s because you’ve got consolidation of retailer power and the competitors of the great Australian market. Lots of Australian producers want to be here and they’re prepared to pay to be here. It’s just that margins have been diluted.*

(WP1)

So although it is currently very important to be present in the UK market all the companies were looking to develop outside the UK. Beverland and Lindgreen (2002) whilst confirming the power of the retailer, note that some wine production companies also have power since it is against the multiple grocers’ best interests not to stock the most popular brands that low involvement consumers seek.
Within the UK market, the wine producers identified that ‘there are pockets like the on-trade where there are [still] big opportunities’ (WP2) for growing ‘our portfolio of on-trade and fine wines’ (WP1). They separated out the restaurant trade from the bar / pub trade and identified current and historical barriers to growth in each area that needed to be removed in order to develop the wine market in both.

They agreed with writers such as Hall et al (2001) that buying in the on-trade was inherently more stressful than in the off-trade. They felt that this was an area where brands could be very useful in increasing wine sales:

"brands can play a hugely important role that's being underutilised right now, because it is a product people have heard of, they are confident in, if you see Blossom Hill behind the bar or Gallo behind the bar and you drink it every day you are going to be more confident to buy it. If it's something you've never heard of, with an odd name, you're going to be a little more reticent, you may choose a beer, or a beer brand you've heard of."  

(WP1)

The wine producers felt very strongly that the on-trade’s reluctance to have branded wines at the mass consumption end was due solely to the fact that the on-trade believed that a consumer would not pay for ‘a bottle of Gallo Sauvignon Blanc which you can buy everyday at £4.99 and I'm charging you £19.99 in a restaurant’ (WP1). There was disagreement about whether or not consumers would be prepared to pay a differential between the on and off-trade price for their favourite branded wine, because:

"in every other single category you are buying on-premises you are massively overcharged versus what you are charged in a supermarket. You buy Coke at 30 a tin, you pay £1 for a similar amount in a pub, you buy 24 cans of Stella for £10.00 in Sainsbury's you pay £3 for a pint in on-premises. ...I don't think the consumer's actually thinking about that, being overcharged, but they are accepting it readily and don't find any problem with that because they are in a pub, they like the environment, they're with their friends, they are being served rather than taking it home and they accept it readily."  

(WP1)

Instead they felt that the prices charged by the on-trade were often far too high and this was what put consumers off buying wine available in the off-trade. WP2 also confirmed that:
we've done a lot of research in on trade outlets talking to consumers and they're saying, those who've got a low confidence level and they're just buying mainstream wine, just a glass of wine with their dinner, they'd love to see the same wines that they see in retailers, at home because they just trust it and what they're paying at premium for is the fact that they're out with their friends, they're in a nice environment, they're socialising, they pay a premium for that, they're happy to do that.

(WP2)

The problem as the wine producers saw it was 'the obscene margins' (WP3) which were sought by the on-trade establishments because of an outdated policy made by accountants demanding an '80%' plus profit margin on each bottle. As table 6.1 shows actual profit margins in the on-trade can be much higher than that depending upon the method of calculation.

<table>
<thead>
<tr>
<th>Business characteristic</th>
<th>Off-trade</th>
<th>On-Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biggest supplier</td>
<td>Australian No. 1</td>
<td>France No. 1, followed by Australia</td>
</tr>
<tr>
<td>Brands</td>
<td>Dominate retailing amongst multiples</td>
<td>Brands not dominant yet some buyers shun brands</td>
</tr>
<tr>
<td>Consumer decision-making process</td>
<td>Primarily a self-select process</td>
<td>Hand-selling</td>
</tr>
<tr>
<td>What works well?</td>
<td>Clear, simple propositions, with winning presentational cues</td>
<td>More receptive - opportunity new varietals / regions</td>
</tr>
<tr>
<td>Merchandising</td>
<td>POS, promotions, prices</td>
<td>Wine list as selling tool</td>
</tr>
<tr>
<td>Goods</td>
<td>varied</td>
<td>Food-compatibility</td>
</tr>
<tr>
<td>Gross profit</td>
<td>~30% to ~50%</td>
<td>~200% to ~300%</td>
</tr>
</tbody>
</table>

Table 6.1: Comparison of On and Off Trade Characteristics, WSET 2003 – 2006. Wine Intelligence, p74

What we are trying to do is encourage the on-trade, be it bar, or a gastro pub or whatever it is, to price their wines at a level that gives them a good return, a good cash return

(WP3)

rather than an arbitrarily set gross profit percentage because they felt that whilst consumers would pay more for the same wine in an on-trade premises than in the off-trade they would only do it if the mark up seemed reasonable. If the higher price was perceived as reasonable to consumer would buy more and then both the on-trade and the wine producing companies would benefit. They did comment that since the initial purchase cost of a bottle of wine was much higher than a coke or beer etc., a bottle of wine was always going to be perceived as a more costly and therefore more risky purchase than coke or beer.
These comments related to chains such as Wetherspoons, The Walkabout or All Bar One which are mass brands in themselves, both products and outlets. The wine producers agreed that the reason for not wanting brands in independent on and off-trade outlets was to maintain ‘one of your points of difference between Sainsbury’s and Tesco’s’ (WP1) and also because in:

what we’d call the white tablecloths environment people do want to see something there because they’re probably looking for a real food and wine experience and they don’t want mainstream supermarket brands, they’re looking for points of difference.

(WP2)

The wine producers were suggesting that in middle to top end restaurants, wine bars or other environments where wine is a significant part of the public occasion consumers are looking for a social and cultural experience that they could not produce at home and the food and wine need to match this requirement.

6.7.2. Staff Training

Staff training was also identified as a method of improving sales in the on-trade since the bottle was often not on display. If the staff could describe or recommend a wine this could reduce consumer stress and increase sales:

the single biggest marketing tool in on trade, driven by quality, is endorsement. Whether it’s endorsement by a sommelier in a fine wine restaurant where there’s a lot of people look for recommendation, a lot of people look for advice and you need the people in on trade to be supporting your wines and recommending them, so getting the experts in the on trade environment to recommend your product is a fundamental tool to market to the consumer.

(WP1)

This point is confirmed by Lockshin and Kahrmanis (1998) and Johanson and Bruwer (2004), however The Vinexpo Studies (2003) suggest that most people do not bother to ask because they doubt the knowledge of the staff. The activity of wine wholesalers training is discussed by the trade wine buyers and Catchpole (2004). Constellation, currently one of the largest wine producing companies in the world, has extended this activity by producing a training package which it is marketing directly to the on-trade. The training package is called the World of Wine
and enables on-trade premises to purchase the package or hire in a tutor all the while raising the profile of Constellation’s wine portfolio amongst on-trade staff.

6.7.3. Wine in Pubs

The wine producers accepted that a specific barrier to increasing wine sales in pubs was a general perception that wine in pubs was not always good either because the bottle could have been opened several days ago or just because of the general perceived quality of pub wines in non foodie pubs. Charters and Pettigrew (2002), Charters (2004) and Catchpole (2004) would all suggest that the quality of wine in pubs along with all other establishments has improved so that the quality issue is one of consumer perception rather than reality; poor maintenance of the wine may still be a problem.

One solution proposed by the wine producers was the development of small bottles, ‘so that you get a single glassful’ (WP1) and they noted that ‘there’s the 18.7 cl bottle which fits exactly a 175ml glass’ (WP3). When wine from a small bottle is sold the bottle is opened in front of the customer so that they can see that it is ‘fresh’. With the increase in small bottles with screw tops for self service on aeroplanes, cross-channel ferries and in some supermarket outlets, it was felt that in certain environments there was growing acceptance of these individual bottles of wine.

In an environment where whole bottles were seen as the more appropriate container two diametrically opposed suggestions were made to increase bottle sales. One wine producer suggested that

if you reduce the price of a bottle, so that it actually is a benefit against a similar number of glasses, three 250 ml glasses for example, buy two and get one free

(WP3)
then the consumer would be more likely to buy a whole bottle, there would be no wastage and the consumer, on-trade premises and wine producer would all benefit. This type of promotion is currently used by chains such as Mitchell & Butler and the Barracuda Group.

If a bottle is opened and only one glass sold before the wine goes off this is wasteful and damages profit margins so a strategy common in America was commented upon:

they've found a way around it in that a glass of wine in the US is $5 for a glass of wine, they're probably charged $5 from the producer so there is no issue of wastage. They [cover] their cost the minute they've poured the first glass. (WP1)

The implication being that the on-trade premises would then be happy to pour away the rest of the bottle if it didn’t sell before it went off as they had covered their costs and profit was achieved from the sale of the second glass onwards. If all of these wine producing companies have been undertaking qualitative research with consumers and they and the consumers describe on-trade prices as generally too high it seems curious that a recommendation to increase the sale of wine in pubs would include one that would be likely to increase the purchase price to the consumer, perhaps indicative of a lack of true understanding of the UK consumer market.

6.7.4. Future Consumers

In several European countries, consumption levels of their traditional alcoholic beverages are on the decrease (Vinexpo Studies, 2003) whilst ‘new’ alcoholic beverages are increasing. This is partly due to ‘social responsibility issues’ (WP1) such as the enforcement of drink driving laws and partly due to generational image:

if you take France for example, a whole generation of people were turned off wine because their parents drank too much of it, it was like draught beer here, it was of the age of the Sheffield steelworks and the miners drank pints every lunchtime. (WP3)

It was suggested that wine in the UK will not have this generational image problem partly because better quality wine is being sold in new outlets such as pubs and partly because:
people haven't aligned themselves to brands quite in the same way as they have in other [alcoholic drink] categories, so they don't really know that their parents might be a Lindemans loyalist it just doesn't work like that.

(WP2)

Lack of brand dominance was seen as a positive strength in attracting the next generation to move into wine drinking as they matured and their lifestyles changed:

there is a sense of slight more sophistication with wine, a sense of I am growing up, a right of passage and I think wine does play a role in that, no question.

(WP1)

6.8. Trade Wine Buyers

Bourdieu's work shows that wine is used to demonstrate symbolic and cultural capital, Featherstone (1998) suggests that people adopt the cultural mores of the group they aspire to join. Williams (2001c) suggests that most people who work in the wine trade do so for love of the product rather than the more usual career aspirations and are therefore particularly susceptible to reification. Whilst not overtly stated, there was a view, particularly from the wine producer who had recently moved into the trade, that those who worked at any level within the wine trade could become so involved in wine emotionally that it affected their professional outlook perpetuating reification and cultural exclusivity. This point had also been raised by two new entrants to the trade wine buying world.

WP1 suggested that one of the reasons that the emotional side of wine exists is because of the social and cultural elements which are present in so few other consumer goods categories:

yes it is definitely a more fun business, more interesting business, more interesting people and more interesting product. You drink it at home, you talk about it with your friends, it's much more engaging because there is a lot more emotion about it, a lot more social elements about it whereas washing powder's incredibly rational

(WP1)

This social, cultural and emotional side of wine whilst being one of its attraction to many people at all levels of involvement may also be one of the reasons that as with celebrity chefs it is also
associated with cultural exclusion, ‘this is my wine and you’ll bloody well drink it’ (WP2), and social snobbery. There was a feeling amongst the wine producers that this extreme form of exclusivity and snobbery needed to be eradicated because ‘consumers don’t want to do that [to be told what to eat or drink] they want to eat or drink what they like’ (WP2).

Paradoxically one of the positive aspects of wine is its aspirational quality which necessarily includes exclusivity amongst some social groups whilst the social nature of wine consumption promotes inclusivity.

6.9. Social Responsibility

Alone amongst the external stakeholder groups all of the wine producers mentioned social responsibility in respect of wine consumption, although this topic was not explicitly introduced into the interview. They felt that as producers of alcoholic beverages they had to take an ethical stance with regard to the supply of alcohol as far as they were able, this was principally related to marketing activities.

As social responsibility towards alcoholic consumption becomes more of an issue within the alcohol production industry and the adult population part of the positive image of wine was that wine is not currently perceived as a product aimed at binge drinking (Ehrlich, 2002) unlike those ‘products that actively market and target younger people with high levels of alcohol’ (WP1). It was agreed that instead ‘for food and drink occasions wine is still winning hands down’ (WP2), but the wine producers were concerned that the drinks industry as a whole should ensure that:

that wine is retaining its status as a drink of moderation and enjoyment and not simply something that is a source of alcohol.

(WP3)
This perception of wine as a drink of moderation was seen as a positive image particularly for the more sophisticated or mature consumer even though reports such as AHRSE (2004) suggest that wine can be part of the binge drinking experience. The wine producers themselves acknowledged that:

\[
\text{if you look at a lot of the press at the moment, wine seems to be getting talked about a lot in the context of binge drinking with female drinkers. I think wine could and should be more socially responsible, because you can drink it in moderation and enjoy it with food and enjoy it in a more sophisticated environment and enjoy it in moderation. (WP1)}
\]

They all felt strongly that wine promotion and marketing should be proactively orientated away from any suggestion that wine was a drink for binge drinking partly as socially responsible companies but also because it could damage wine's mainstream image as a sophisticated, aspirational product.

**6.10. Summary**

Although the wine producers said that their companies were undertaking qualitative research into the UK wine consumer they seemed to be far less aware of the end consumer than the trade wine buyers. A great deal of their effort was directed towards producing wines for the largest outlets in the UK, the multiple grocery chains, even though presence in these outlets had the potential to lower profit margins whilst increasing turnover.

Whilst all of the wine producers complained that they had to support price promotions in order to gain access to national distribution chains they each have so many brands that at no time were all of their brands being sold on promotion in all of the multiple chain outlets. W13 described the wines on price promotion as a rotation, starting in one multiple grocery chain and then moving on to the next, then when that cycle was finished the next brand would be promoted.
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All of the companies practised economies of scope partly to achieve a large range of wine, but also in order to be able to react to the individual needs of each market place within the UK and internationally. They were all aware of the paradox, highlighted by Goode (2004), that even though most wines consumed are mass produced most cannot be marketed as such without losing part of their mystique and image even though low involvement consumers like the safety of known brands.

The wine producers were also aware that the perceived proliferation of brands gave the consumer a wide choice which prevented wine as being seen in the UK as the drink of only one group or generation. There was enough scope for it to be seen as an attractive product across most age ranges, social classes and for most occasions. The wine producers did say that the brand proliferation meant that that marketing budgets were much smaller than for other FMCGs but did not overtly balance that against the positive aspects of diversity.

They all felt that the influence of the written media was diminishing and in-store promotion and or support for TV lifestyle programmes were more effective marketing media than other written media especially to promote the mass produced commercial end brands. However they all used quotes from wine journalists and medals won at wine competitions judged by wine journalists as part of their in-store point of sale promotions. This was done despite having agreed that the general wine consumer didn’t know who these wine journalists were.
# Chapter Seven
## Results – Media

### 7.1 Introduction

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Chapter Seven

Results – Media

7.1. Introduction

As discussed in the Introduction and Methodology Chapters the media were identified at the start of the research study as one of the significant potential influencers on wine purchasing and consuming behaviour in the UK. The Literature Review showed that there has been no specific research done in the area of how, if at all, the media influence the UK wine consumer. Ritzer, (2001), Charters and Pettigrew (2002) and Charters (2002 and 2004) show that there is very little media coverage of moderate mass consumption of wines. The trade wine buyers agreed that they felt that all consumers were influenced by the media to a greater or lesser extent and highlighted several areas where they felt that the media were significant influencers; primarily newspapers (both tabloids and broadsheets) and television.

Wine Intelligence (2002) concluded that most of their interviewees used ‘printed material’ to help choose a wine and identified influences ranging from point of sales information only to television and radio influence and one group which actively sought out specialist magazines and books. Mintel (2001) in its market survey Women and Wine identified that about 14% of their focus group respondents read and absorbed information on wine but it had no overt impact on their buying behaviour:

*occasionally read wine columns or wine features in the weekend press and/or watched wine features on the television...there was no real evidence of follow on featuring wines.*

(Mintel 2001 p.18-19)

The interviews with the wine journalists discussed areas identified by the trade wine buyers, by secondary research and other areas that they themselves felt to be of significance. These are the results presented in this chapter.
7.2. The Purpose of Wine Journalism

There was complete agreement amongst the wine journalists that their purpose in communicating was ‘interest’ and ‘education’, incorporating entertainment and humour, ‘first and foremost you need to capture their attention’ (WJ1). None of the wine journalists interviewed considered themselves to be the ‘shopping list’ journalists described later in this chapter, neither did they believe that it was their job to sell wine to consumers on behalf of the wine trade when writing in consumer publications, although they felt that that was what many in the wine trade wanted them to do.

7.2.1. Newspapers and Magazines

There was complete consensus amongst the wine journalists that articles in newspapers or magazines of any type were written for that publication’s readership:

*definitely the consumers, but obviously the tone and level that you choose varies from publication to publication.*

(WJ5)

Therefore it was important to know who the readership was since it could vary from the vaguely interested to the committed who wanted to learn more to members of the wine trade via trade magazines. Beyond this though there were two views as to what writing for the consumer meant; some considered that they should only really write about the type of wines that their consumers drank regularly £2.99 wines and *‘drinkable stuff which is inexpensive’* (WJ3); others, agreeing with head office trade wine buyers, considered that part of their job was to provide enough information about new less well known products so that *‘there’s the chance that people might be inspired to buy it, if they’re given the confidence to do so’*, (WJ2). These people would be likely to be innovators as described by Goldsmith and d’Hauteville (1998).

Whilst accepting the seasonality of some topics, i.e. Christmas or summer, the wine journalists commented that there was also a need to avoid repetition and so potentially boring their readers.
Those who travelled particularly liked to write about 'new places and new regions within countries... interesting for readers' (WJ3). All said that they wrote about wines whose taste, quality and or price quality ratio were perceived to be of interest to the readers of that particular publication; they did not write about wines they perceived to be bad or of poor quality.

As a result all of the wine journalists, as a courtesy to their broadest reader base, tended to write about wines sold in off-trade chains so that there was the greatest possibility of the general consumer being able to buy the wine discussed if they were inspired by the article:

I tend to favour those things also because they have national distribution in most cases, so they’re easier for a broader spectrum of your readers to get hold of these wines, so it’s about accessibility as much as anything.

(WJ2)

Paradoxically this meant that they did not often write about less easily accessible wines which might be the very ones that discovery consumers who would read wine articles might be seeking. This is despite all, except WJ1, saying that it was a part of the journalist’s educational and inspirational role to write about good value wines that were not necessarily on the consumers normal shopping list if they considered them to be exceptional thus giving the consumer the confidence to experiment when they wanted to do so:

part of my job is to recommend wines that are good value for money, but I think good value for money and cheap are not necessarily the same thing and people need to understand that. If you are buying a car a Trabant is not as good as a Jaguar and it would be disingenuous to pretend that it was.

(WJ2)

This would agree with the work of Bruwer et al (2002) that more sophisticated consumer trades both up and down the price quality scale depending upon the consumption occasion.

There was acknowledgement that in some newspapers and lifestyle magazines, the editor could and did dictate some of the content, i.e. price ranges or that the wines discussed should match the food presented in that edition. As a result some of the interviewees would not work for certain of the mainstream newspapers.
7.2.2. Wine Books

The function of wine books was identified; good, well written, informative, books could become useful or even occasionally essential reference tools for both involved consumers and the trade although they were likely to have ‘zero effect on the ordinary wine buyer in Asda’ (WJ5).

When talking about the type of consumers who read wine books there was a view that these were interested, committed consumers engaged in a:

\[\text{personal journey with an emotional side to it} \ldots \text{because} \ldots \text{once you get into the subject you discover that there's a whole culture there.}\]

(WJ5)

This would link with Bourdieu’s work and that of Groves et al (2002), Wright et al (2002), Charters (2004) and Demossier (2004) showing how elite groups use wine and the image of wine to gain social, symbolic and cultural capital. Christy and Norris (1998) and Ravenscroft and Van Westering’s (2000) work also discusses the discovery aspect perhaps identifying the wine hobbyist or buff for whom the gaining of this particular knowledge is more internally personal and less externally symbolic than that of some other acquisitors of wine knowledge. There was also a view that this group, as a group of hobbyists, would probably seek out information on specialist wines by all sorts of routes whether or not wine books per se were written.

7.2.3. Wine Tastings

Those who run tastings for consumer wine circles or clubs identified a group of interested and informed consumers who learnt about wine solely through tastings:

\[\text{they hadn't read books, they didn't really buy wine books much. They just like tasting.}\]
\[\text{They had these twelve tastings a year to which they invited producers, or retailers or whatever and they were perfectly comfortable like that.}\]

(WJ5)
This behaviour is also exemplified by many members of the Cardiff Wine Tasting Circle (CWTC), to which I belong and by some in the consumer focus groups, (see chapter eight). Having got their basic knowledge these wine consumers want to learn by tasting and discussion but not to read or 'work at it' as one CWTC member explained it to me. This social group, also identified by Seymour (2004), engaged with wine in specific social situations often to quite an intense level but did not and would not read about wine except perhaps in order to place an order. Whilst most identified with this group had a serious involvement with wine, there were others for whom wine was a public consumption object necessary to demonstrate symbolic and cultural inclusion within the social group whilst not necessarily being their preferred drink of choice in private situations, confirming Demossier's (2004) work.

7.3. Range of Media Influences.

Varying forms of media and publicity generating sources were mentioned by the wine journalists, all of which they were involved in except straight forward advertising campaigns, see table 4.2. The wine journalists were particularly involved in all forms of printed material, wine lecturing and tasting, and wine competition judging

They did not agree with the trade wine buyers that consumers believed everything they read if it was in their preferred choice of media. They agreed more with Kalaitzandonakes at al (2004) that the exact relationship between media coverage and the consumer is very complex and hard to assess accurately. They agreed that whilst perhaps there are:

\[ a \text{ lot of people [who] are very trusting and they will follow slavishly what they have been told,} \]

(WJ4)

prolonged influence was more analogous to a theatre or restaurant critic. If their writing happened to click with certain consumers, the wine journalist would build up a following with these consumers who would read their work, articles or books wherever published and would
often set up a correspondence via letter and more currently email which could last many years. In this correspondence the consumers demonstrated the characteristic behaviour of the heavily involved consumer; often asked for advice and saying that some article has inspired them to become interested in wine, an interest which had now become part of their lifestyle.

7.3.1. Marketing Campaigns

All of the journalists commented upon the Gallo wine company’s UK campaign about five years ago as an example of where a big budget had 'bought market share' (WJ2 and WJ5):

> there were double page ads, with Ernest and Julio Gallo wandering through the vineyards through the night, and they were everywhere, ... the Sunday Times, all the colour supps., and the glossies.

(WJ2)

Equally they all commented that most companies do not have that type of budget and even Gallo (at that time ‘the biggest wine producing company in the world’, WJ2) could only afford to put a significant marketing budget aside during the initial awareness raising campaign year. Subsequent UK marketing campaigns have been much lower; detailed in the annual The Drink Pocket Book series 2002 to present. WJ1 alone felt that consumers were not influenced by the Gallo campaign, but Gallo became a significant brand in the UK market immediately after its campaign and remains so today. Key Note Ltd (2004) shows and discusses the point that:

> advertising expenditure in wines is matched fairly closely to brand share, so that brands like Gallo, Kumala, Jacob’s Creek and Arniston Bay, Lindemans and Hardy’s are prominent both in the media and in the sales charts.

(Key Note Ltd 2004, p. 49)

These are all mass produced wines widely available in supermarkets, confirming previous discussion (Rink, 1998: Chaney, 2000: Mintel, 2000: Hofmann, 2004) that only brands owned by large parent companies can afford the cost of a large marketing campaign. Perhaps more importantly, given reduced advertising expenditure and increased consumption, they are also the only companies able to produce the volume necessary to achieve nationwide distribution within
the multiple grocery networks and support the price promotion campaigns required by supermarkets to get the initial listings.

7.3.2. Newspapers and Lifestyle Magazines

There was mention of wine and food going together and how newspaper articles relating to this aspect of wine could emphasise the 'civilised, healthy side of drinking' (WJ3). This, it was suggested, was the rationale for wines inclusion in lifestyle supplements even if in reducing amounts of column space: to supply the newspapers with token cultural credibility whilst at the same time increasing the space for holiday and travel articles which attracted more financially lucrative advertising; ‘there is still a sense that wine is part of happy healthy prosperous media savvy life’ (WJ5).

7.3.3. Television

TV was acknowledged to be the most significant media but all agreed that restricted budgets made it inaccessible for most wine producing companies to conduct a straightforward marketing campaign. The wine journalists agreed with Randall (2000) in confirming that the support of lifestyle programmes and value of primetime television programmes, when they happen, offered emotional cues to the wine buying public and Halstead (2005) confirms that the most recalled TV advertising was that supporting lifestyle programming. In addition there was some suggestion that the current lack of wine programmes on TV was because wine is not very visually exciting in itself and it needed to be part of a more visually stimulating package to be successful:

you’re just taking the cork out of the bottle and pouring it into the glass...I’ve heard that from the horse’s mouth.

(WJ4)

There was also acknowledgement that television wine advertising regulations were quite proscriptive, making it hard to create a compliant and socially inclusive advertisement.
7.3.4. Image of the Country of Production

There was agreement that where a country was well regarded, had a positive press image, as with Australia (Murphy, 2003) or Australia and South Africa (Wine Intelligence, 2005) it could help to bolster the image of all products from that country including wine, but where the image of the country was damaged that could reduce sales, for example French nuclear testing in French Polynesia led to many British consumers boycotting French produce.

7.3.5. Competition Wine and Medals

All of the wine journalists were wine judges at various national and international competitions. Although the trade wine buyers had queried the integrity of some of the wines which won competitions, the wine journalists felt that provided the competition was well run and the judges competent then 'the wines that win trophies tend to be pretty good wines' (WJ1). However some producers 'refuse on principle to enter their wines into any competition' (WJ4), so that fact that these wines are never awarded any medals does not reflect upon their quality but may call into question the validity of wine competitions as marketing tools. Lockshin (2004) shows that when wine has won a medal if this is translated into point of sales and or labelling information it always has a positive effect upon sales.

All accepted that judges can only judge the wine that is presented to them as it shows on that day in the conditions of that particular environment and given the subjectivity of any tasting event, as previously discussed by Gluckman (1990) and Goode (2005), it may well be that 'sometimes the wine that you would want to drink a whole bottle of is not necessarily the wine that wins' (WJ1); in that sense the information conveyed to consumers may not be as accurate as the consumer perceives it to be.
None of the wine journalists felt that wines which won had been deliberately constructed for competition, a point strongly felt by the trade wine buyers, but they did accept the idea that there were production companies who were deliberately changing their wine style so that it would win approval from Robert Parker. Since not all wine judges have the same taste preferences this does not necessarily mean that the ‘Parkerised’ wines are more likely to win competitions.

7.4. Labels

As part of the discussion about written material labels and labelling were mentioned as potentially important communication tools. Whilst there was no consensus as to what makes a good label the importance of comprehensive back labels written in English was highlighted since it was recognised that a:

*good back label costs the producer not a lot and is 150 times more effective than any press recommendation. It is the producer’s primary communication with the consumer.*

(WJ5)

‘Clean and elegant’, ‘modern and fresh’ were words used to describe a good label. There was consensus that labels had become simpler and easier to understand, although the work of Chaney (2000b) and Murphy (2003) would dispute the accuracy of the terminology used on them. There was agreement that some consumers buy just because ‘it has a pretty label’ (WJ4) and a view that labels were probably more important at the lower end of the market because those seeking for wine at the higher end would know more about wine, be looking for technical cues such as producer or appellation, and so would be less influenced by label design alone.

Some felt that print advertising as in a BOGOF promotion was more generally influential but that there was a likelihood that some consumers didn’t care what the wine being advertised was only the price deal that accompanied it.
7.5. Stress

Only one of the wine journalists, who has a regular column in a national newspaper, thought that wine buying was stressful; ‘when I say stressful, I think that it is worrying and perplexing’ (WJ1). This journalist felt that consumers ‘found it comforting to have somebody who can lead them by the hand through the maze’ (WJ1) and that by buying a wine recommended by a wine writer they were ‘diminishing responsibility’ if anything was perceived to be wrong with the purchase. This concurs with the work of Johnson and Bruwer (2004) who showed that the low involvement consumer (who tends to buy at the lower end of the price range) needed more reassurance, basic wine information, than the more heavily involved consumer.

However all the other journalists disagreed considering that ‘in supermarkets it’s pretty easy to find your way round now’ (WJ2) and therefore buying wine was:

no more stressful than anything else in life, driving around the M25 is a stressful experience or trying to work out which bus to get from Charing Cross to Oxford Circus.

(WJ5)

The majority of the wine journalists felt that people currently buying wine in lower price brackets, £2.99 to about £3.50, did not perceive themselves as taking a significant risk financially or otherwise, a view confirmed in the Literature Reviews (Bruwer et al, 2002: Olsen et al, 2003: the Vinexpo Studies, 2003: Williams, 2003: Johnson and Bruwer, 2004) although that would have been untrue about twenty years ago:

the last two decades were decades of discovery and decades of democratisation as far as wine drinking was concerned and people need a lot of help to come along in that period so that’s why wine journalism became mainstream. I feel that period is drawing to and end now ... because people don’t feel the need for the same affirmations just to get into wine ... wine choice is getting simpler and simpler.

(WJ5)

The wine journalists believed that it was patronising to assume that consumers were unable to choose wine by themselves since they believed that consumers ‘liked having that choice’ (WJ4) and that ‘there are plenty of sign posts there to guide people through the maze of wine’ (WJ2), opinions supported by Thompson and Vourachis (1995), Quester et al (1996), Bruwer et al
(2002), Richardson and Dennis (2003) and Steiner (2004). There was in fact a view that the belief in the stressful nature of wine buying was a combination of reification on the part of trade wine buyers and an excuse for lazy buying habits:

but the point is they've advocated their responsibility to find the best wines out there because they've been corrupted by big branding into devoting more and more shelf space to those brands fundamentally for financial reasons.... They give half the shelves to Nottage Hill which they've done because Hardy's offered them £1/2 million for the privilege, for nothing else, for no other reason.

(WJ5)

All acknowledged that, in its many forms, the information good wine journalists provided was needed by all groups of wine consumers when they decided to buy outside their normal wine range, particularly if the wine or the occasion for the wine was very special and for those setting off on their own journeys of discovery; a view supported by Christy and Norris (1999), Lockshin et al (2001) and Johnson and Bruwer (2004). The wine journalists were aware that there was an enormous range of ‘normal’ price points, as discussed by Quester et al (1996), Dodd (1997) and Johnson and Bruwer (2004), so whilst they would write about ‘£100 [wine] if I think it’s worth it’ (WJ2), most generally wrote about lower priced wines because ‘up to £9.99 it’s pretty aspirational for somebody who’s only spent near £3.49’ (WJ4), approximately the current average off-trade bottle price.

All the wine journalists agreed with the findings of Lockshin and Kahrmanis (1998), Hall et al (2001) and Johnson and Bruwer (2004) that no stress was only true when buying the ‘daily’ wine in the off-trade and that ‘where people do find it slightly intimidating is in restaurants’ (WJ2) especially if they don’t recognise the names of the wines on the list, if there is a pushy wine waiter or if the occasion is intrinsically stressful.
7.6. Wine Quality and the Supermarkets’ Role

There were two widely held views on the current state of the wine trade in the UK related to some extent to national off-licence chains but in particular to the role of the multiple grocery chains. The positive aspect was to acknowledge what New World wines and:

*the supermarkets have done for wine in this country, that’s why people are drinking more wine now, its nothing to do with the wine writers. It’s always been wine writers, [in the past], now it’s because it’s better stuff in the bottle.*

(WJ4)

There was general agreement that with the advent of southern hemisphere wines, particularly Australian, ‘that it’s meant that we’re drinking better, the average quality of the wines that we’re drinking is better than its ever been’ (WJ2). This is confirmed by the work of authors like Charters (2004) and all sets of current statistics show a rise in UK wine consumption, i.e. Mintel, Key Note and the Drink Pocket Book series.

Increased wine consumption is also likely to have been helped by the fact that wine prices have fallen in real terms over the past twenty years (Rose, 2005: NTC Publications Ltd, 2000) as well as wine being made more accessible, via the national chains. Although this rise in consumption was mainly in branded wines at the lower end of the price range it was considered that:

*it’s not necessarily a bad thing [because] some of these branded wines are taking wine to new audiences... people who wouldn’t previously or ordinarily drink wine.*

(WJ2)

Conversely a potentially damaging and negative side to supermarket business strategies in regard to wine sales was also identified:

*the wine world is increasingly dominated by a small group of large companies all of whom have branded products and they serve the interests of the supermarkets ... and the off licence chains, but particularly supermarkets by providing them with branded goods that the supermarket can discount and use as loss leaders really to get people into the supermarkets*

(WJ2)

This behaviour is confirmed by Penn and Christy (1994), Howley and Myers (1998), Beverland and Lindegreen (2002), Lockshin (2004a), Muir (2005) and Cheesman (2005). All of the
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Journalists felt that this business strategy was ultimately bad for the image of wine, even if currently it meant ‘that they [the low involvement consumer] drank wine every day rather than wine being a special and only a special occasion thing’ (WJ1), and so it becomes part of their lifestyle. The problem identified was that if ‘wine is used as a gentrification tool by all these places [supermarkets] to haul people in’ (WJ1) then the wine buying ‘deal junkies’ also identified by the trade wine buyers are created.

The wine journalists suggested that there are a group of wine consumers who remain supermarket / national chain loyal, ‘between 30% and 40% of the total wine drinking population [who] really doesn’t care too much in what it is.’ (WJ5). The wine journalists expressed the same concern as the trade wine buyers and the wine producers, that whilst these consumers may be country or shop loyal:

they’re not brand loyal ... I think consumers are quite sassy or canny and they look and see what is on promotion and buy the cheapest wine. I’m worried that we’re encouraging a generation of deal junkies to drink wine and I think in the end that’s not good for the wine business.

(WJ2)

Some agreed with Lyon (2004) that consumers would become bored by the simplicity of the fruity styles and move onto something more ‘sophisticated’ at some stage. Other journalists were worried that consumers bought up on simple fruity styles would never gain a knowledge of food and wine matching:

the understanding, the comprehension of what those aromas and flavours are, the sense that they make within a meal time context.

(WJ5)

Therefore there was a danger that some traditional quality wine styles or regions would disappear along with real choice for the consumer.

Some felt that this would also lead to ‘some of the medium and small sized people being squeezed out of the UK retail scene’ (WJ2); others suggested that this could help to reverse the
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decline of independents as more sophisticated consumers started to actively seek out more unusual wines. This paradox was summarised by one wine journalist as follows:

*There’s been so much consolidation on the high street and amongst the supermarkets and the brands have cut ...right through the supermarket wine selections that de facto independents are suddenly doing so much better because consumers aren’t stupid and they realise that they’re just running out of choice [in supermarkets].*  
(WJ5)

Another journalist wondered if independent producers would really be harmed because:

*a lot of quirky producers don’t produce a lot of wine anyway. They can sell what they make and we’re not the only market in the world of course.*  
(WJ4)

Several of the wine journalists made the point that one effect of the rise of the supermarket wine offer and their normalisation of daily wine buying was that for many consumers ‘it wouldn’t matter a jot if we didn’t have one wine writer in this country’ (WJ4).

7.7. The Quality of Wine Writing and Integrity of Wine Journalists

One journalist commented upon an attitude prevalent throughout the wine trade when they had first become a wine journalist over twenty five years ago, elements of which still persists in some quarters today:

*the old wine merchant adage is that the customer can’t tell the difference, doesn’t have the knowledge to influence their taste anyway and they can jolly well have what we choose to give them and what we choose to buy for them, they can put up and shut up.*  
(WJ1)

Some journalists felt that there were still some wine journalists who also fell into this ideological group and that their main raison d’etre for being a wine writer was so that they would be able to drink wine and so gain the social, symbolic and culturally elite capital, identified by Bourdieu that they could not otherwise afford:

*I was astonished to find that there were lots of wine writers all drinking very expensive wines. It wasn’t that they wanted to write about them, they didn’t want to write about cheap wines because they wanted to taste the stuff that they couldn’t actually afford.*  
(WJ3)
These wine journalists would have very little interest in or understanding of the majority of wine consumers and their reviews would be prejudiced by the need to be invited on another trip and therefore be of little use to the wine trade. Many of them whilst they:

know about wine, some more than others, ... I just don’t think that they are very good at interesting an audience, they’re not very good journalists'.

(WJ2)

They considered that these were the wine journalists whose integrity the trade wine buyers had rightly queried but that they were no longer the majority of the trade. This would be the type of wine journalist most likely to reiterate elitist myths about wine.

At the other end of the spectrum the ‘shopping list’ journalist was identified where the writing was basically simply a rehash of the wine producers own publicity material. This could be caused by:

the editorial policy or influence, that they want writers to talk about what’s on promotion this week. Then you are absolutely hidebound because, look at the promotions, every month or maybe more frequently depends on the supermarket they send out their promotions list. ... After a while one begins to notice that the same wines are cropping up on promotion time and time and time and time again.

(WJ4)

As a result of this it becomes very difficult to write anything new, different or interesting about these wines. Another cause of ‘shopping list’ articles was a junior or non-specialist journalist:

copying out the press release, ... and they haven’t got a clue whether the wine’s any good or not.

(WJ4)

In both of these instances the editorial policy of the publication was identified as being the cause of bad journalism and the wine journalists felt that there was nothing that they could actually do about it short of not writing for those publications.

However half of the journalists interviewed also identified a third form of ‘shopping list’ journalism which was neither the result of editorial decisions nor the limited wine knowledge of the wine writer; it was described as lazy journalism resulting in shopping list articles:
it's painfully obvious that a lot of the stuff that gets written up, gets written up simply because it's been delivered as a free sample and therefore is ready copy for when the person suddenly discovers that they haven't got round to doing their columns on the Friday afternoon or whenever it's needed ... whereas proper hard working wine journalism, where you are travelling to different countries, where you are on the trail of real stories, the kind of thing that Jancis [Robinson] does is much much harder work and ... and ... and all those aren't prepared to put that work in.

All of these factors, plus the reduced need for help in everyday wine purchasing, were identified as possible reasons for the decline in column space for wine writing which was seen as:

* a great mystery to wine writers as a whole, I think, because if you look at the statistics we're drinking more wine than before so why do people not want these columns? ... Maybe wine isn't considered trendy [at the moment] .

None of the interviewees questioned their own integrity but, as previously discussed, some questioned some aspects of the integrity of some of the other interviewees, not their knowledge of wine, merely whether or not they communicated that knowledge to their consumers. The dispute was over perceptions of stay at home lazy journalism, as opposed to discovery educational, potentially elitist, journalism:

* the kind of writing that I believe in very strongly is something that's based on character and personality and landscape and giving you a feel... so that it makes people think I'd like to go there.

On the whole it was considered that:

* all the major wine writers in this country can be trusted to be doing a good fair job. Not to be taking bribes, not being paid to write about anything.

These journalists, including themselves, maintained their integrity in two ways. Firstly:

* it is very black and white, you are either a consultant and work for the wine trade and you get paid for it or you are an independent commentator where your readers and your editor are the people that you work for.

Secondly when travelling there was general consensus that they should and would only:

* go on things that are organised by a generic body, so that way I feel that I can say what I want to say.
Ethically trips might also be partially funded by requests to be a judge at an international wine competition which could be piggy backed onto winery visits whilst in that country.

7.8. Current and Future Influences of Wine Journalists

One question which arose from three of the interviewees was why does wine journalism still exist at all particularly in national newspapers and magazines since:

*there's a huge amounts of journalism that might as well not be there for all the good it's doing.*

(WJ5)

This is partially answered by the belief that the editorial policy of many national newspapers requires the cultural capital of a food and wine review in their lifestyle sections. However the wine journalists themselves believed that that most people are unmotivated by what they read in the lifestyle sections of newspapers, if indeed they read that particular section. Those who are interested in discovering about wine will seek out several sources of information and not rely just on one, indicating a belief that the UK public is 'growing [in] sophistication... as a wine consuming nation' (WJ2) and whilst high involvement consumers are willing to read about wine:

*they look at both sides of an argument... they'd probably say 'I hear what you say, I might go and buy a bottle and see what it's like but it's not going to be a regular visitor to my table unless I like the taste'.*

(WJ1)

In general the wine journalists did not feel that they had much influence, especially long term but every now and then they would be contacted by a consumer with whom they had struck a chord and their influence with them could go on for years, 'I started writing about wine ... in 1975 and I still see the same names popping up in my post bag' (WJ1). This could happen even though the article had been in the public domain for quite some time. However it was also agreed that even if someone read an article and liked it you:

*know nobody's going to stop going to Sainsbury's and switch to Somerfield just because somebody recommended white wine in a newspaper.*

(WJ4)
As Dodd (1997) and Hoffmann (2004) had suggested the wine journalists felt that their influence was much more important and influential at the upper end of the market where consumers were actively taking an interest in seeking out special or specialist wines:

*if you are going to buy a £3.99 Chilean Cab sauv from Somerfield, truly the help doesn’t matter too much ... whereas if you’re spending £150 on the greatest Burgundy of your life, that’s when you really need help, so the more up the price chain you go the more potential influence journalists can have.*

(WJ5)

The wine journalists contradicted the trade wine buyers by saying that wine journalists did not normally start trends and if there were suddenly a lot of people writing about a specific product it was more likely to be that wine writers and other media had been bombarded by a particular company or generic board and the lazy writers has simply regurgitated it. However they did say that once in a while those who travelled and did independent research could raise awareness within the wine trade, as with New Zealand, and this could result in wines from a new region being made available in the UK. There was general agreement that:

*there is a pragmatic scepticism in the British people that always takes advice from wherever it comes with a pinch of salt. ... The wine press is far less significant in all of these [European] countries in terms of direct dictatorial influence on people’s buying habits than it is in the States and the Far East.*

(WJ5)

Lockshin et al (2001) showed that there cultural differences in influencers to purchase wine between countries. It may be that the higher scepticism identified by the wine journalists exists because of cultural differences between the UK, the USA and Asia, it may also be because low involvement consumers are more influenced by BOGOF’s rather than written material and high involvement consumers want to make their own decisions. Unwin (1999), Bruwer et al (2002) and Thomas and Pickering (2003a) identified a lack of qualitative information confirming that whilst the UK wine journalists were able to say from their own experiences that there are significant national cultural differences in the influence to purchase and consume they were not able to identify exactly why this is.
The wine journalists mentioned that there are some very good and informative web sites and that an advantage of websites over books is that they can be updated quickly and easily and so remain current. One of the interviewees and the wine journalist who reviewed that draft of the chapter felt that the internet was the information dispenser of the future. None of the interviewees, even one who has a well known website, felt that the internet was anything other than a (possibly significant) adjunct to other wine related activities. Most commented that wine, like a book, is a tactile object and if they had spent all day in front of a computer they wouldn’t then want to use one in their leisure time or take it to bed with them. They cited how consumers in all forms of retail outlet often pick up and handle wine bottles before they take the one they want to buy as an exemplar of the ‘touchy feely’ nature of wine and by extension of wine writing. Limited home access to computers and the fact that only the minority of consumers are confident enough to order ‘wines by the case that they may not have tasted’ (WJ2) were also given as reasons why the internet was likely to remain an addition to the information seeking and purchasing process rather than take over from traditional methods. In contrast the journalist who reviewed that chapter and who has a very well known website felt that they would ‘prefer to go to bed’ with the computer rather than a book and that the internet would become much more significant in the future.

Since Quinton and Harridge-March (2003) show that internet sales of wine have not taken off in the way posited by academic researchers in 1990s it may be that the view of the majority of the wine journalists, that the internet can be seen as a good information source for wine but is an adjunct to sales rather than the entire future, is correct.

7.9. Summary

As summarised in figure 7.1 the wine journalists felt that their influence upon the majority of consumers was indirect and limited, filtering down into point of sales, shelf
edge and labelling information (for competition winning wines), their influence here lasting only 'as long as it remains fresh in the mind' (WJ5).

Figure 7.1: Wine Journalist Influence on UK Wine Consumers

In contrast however they did have a direct, lasting and complex relationship with two smaller groups of consumers, those who see wine knowledge as part of their social and cultural lifestyle and the heavily involved wine buffs or hobbyists. The wine journalists seem to have identified both the boys club and wine hobbyist groups that the wine consumers identified, further discussed in chapters eight and nine, who have a linked but not identical relationship with wine.
Chapter Eight
Results - Consumers

8.1 Introduction

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8.7 Development of Wine Knowledge and Relationship to Buying and Consumption Habits

8.8. Summary
8.1. Introduction

As has been seen in the literature reviews there is literature about wine consumers and how to market to them although most research is neither about the UK market nor UK consumer. Most of the UK based qualitative research is dated, i.e. Mitchell and Greatorex (1989) and Spawton (1991); statistical, i.e. Key Note Ltd, Mintel or The Drink Pocket Book series; or written, however authoritatively, in trade magazines such as Decanter and Harpers Wine and Spirit Weekly. The research to date looks almost exclusively at the consumer and not at the environment that they inhabit; some research investigates how consumers react to different media or marketing stimuli. This chapter presents the results of the consumer focus group interviews in which they were asked to discuss their own wine buying and consumption behaviour as well as areas that the trade wine buyers, wine producers and wine journalists identified in relation to consumer purchasing and consumption behaviour.

The comments of the groups have been analysed as groups because the trade wine buyers, Mintel and Key Note all identify consumer behaviour by demographic grouping rather than individually. However within each group where there were significant differences in buying behaviours, for instance between male and female participants and where these behaviours were common to most female or male participants across all the focus groups these behaviours have also been identified. Whilst each focus group is too small statistically to provide definitive evidence of common behaviour throughout the UK wine buying and consuming population it is possible to establish normative behaviours which run across all of the groups and common cultural behaviours which are displayed within each group or sub group. These behaviours
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identified will be related to current literature, where previously unidentified behaviours are indicated this will form the basis for recommendations for further research.

As discussed in the methodology all members of the focus groups were picked by the link person for the group and figure 8.1 summarises the final composition of the consumer focus groups.

| FG1     | the youngest group, 18 – 24, all participants were male, all single |
| FG2     | participants were 24 – 34, all were female, no couples present    |
| FG3     | a mixed group of participants, both genders, some singles, some couples, aged 35 – 54 |
| FG4     | all participants were couples, aged 35 – 54                       |
| FG5     | participants both in work and retired, mainly couples, aged 55+    |
| FG6     | the expert group, aged between 35 and 59, mixed gender, no couples present |

Figure 8.1 Summary of Consumer Focus Group Demographic Profile

Analysis of the participants’ comments established that there was a wide range in their wine buying and consumption habits and that whilst all drank wine, especially with food, it was not necessarily the drink of choice, ‘I drink beer and wine if I have to’ (FG4) confirming Demossier’s (2004) work. Some focus group participants rarely bought wine particularly members of the youngest group and had a low involvement with wine whilst one highly involved participant, not in the expert group, had set up a wine cellar as an investment as well as for drinking:

_I plan never to drink them but if they went up I would sell two or three of the cases and keep one and then maybe one day I might drink it ...but the reason I bought it was to go up in price._

(FG4)

One participant was pregnant and so only drinking a minimal amount of alcohol; one participant had a medical condition which limited the range of wines which she could consume. One of the participants never bought wine; it was established after the interviews that this was because he
is severely dyslexic and found it extremely difficult to do any multiple choice shopping at all. This range of behaviours is considered positive to the thesis as it ensures that the themes identified run across a range of social behaviours and consumer demographics as well as analysing the wine consumer groups indicated by the trade wine buyers.

8.2. Social Situations in Which Wine is Consumed.

8.2.1. The Food and Wine Synergy

All of the participants agreed that wine and food go together and that in general when drinking with a meal, wine would be the drink of choice, exceptions being a wine and beer/lager mix for barbeques and beer/lager or water with curry or Chinese. This behaviour was almost universal at home, at friend’s houses and in restaurants even for those for whom wine was not the favourite drink. The only group exception was FG1 who whilst concluding that:

I’d probably go for wine in a restaurant with a girl’ agreed that ‘there are some classy beers as well, if you were in a nice restaurant ... but I would choose a bottle over a pint. (FG1)

This was the youngest group and whilst they all felt confident about buying beers/ lagers they were all much more unsure about wine generally feeling that it was better to drink wine when with their parents as ‘they know and they’ll get good wine’ (FG1) unless the nature of the social situation itself, i.e. taking a girl out for a meal, meant that buying wine would be perceived by themselves to be culturally necessary.

8.2.2. Pubs / Social Drinking Outside the Home

There was consensus from all of the groups that where the pub sold good food then the wine would probably also be good and both men and women would drink wine in pubs in these food situations. FG1, all male, expressed a view that drinking wine without a meal in a pub was ‘girly’ (FG1) because ‘there’s lots of girls I know who will go halves on a bottle of wine’ (FG1); FG2, all female, could not ‘picture a man drinking wine in a pub’ and considered that a man
sitting drinking wine on his own or in an all male group in a pub would probably be gay, they would see it as acceptable for those same men to drink wine in a wine bar. These were the youngest two groups.

All of the other groups felt that they, men and women, would drink wine in pubs without a meal if they felt like it but that they wouldn’t be surprised in an untried non foody pub if the wine was horrible. This was the rationale given for choosing other alcoholic beverages in a pub environment. The only group which felt that wine in pubs had improved generally was FG5, the oldest, 'it has improved in the last two to three years'( FG5), all the other groups still felt wine was likely to 'dodgy' (FG2) or 'yuck' (FG3) whilst the beer was likely to be much better kept.

Groups 3, 4 and 6 suggested that another problem with drinking wine in pubs was that it is not very thirst quenching and has a high alcohol level; if you were going out for several drinks then 'a gallon of beer on a Friday night and you’ll live and a gallon of wine on a Friday night I’m afraid' [that you would not] (FG4). Wine was not seen as suitable for a drinking session, whether light or heavy, if you wanted to feel reasonable the next day.

8.2.3. Nightclubs

There was complete agreement that wine was not a suitable for consumption in most nightclubs. Some reasons given were similar to those for pubs, ‘it would be too expensive in clubs’ (FG1), ‘it would be vile’ (FG2), 'it's going to be the cheapest nastiest [wine]' (FG4). The expert group summed up another commonly expressed problem with wine drinking in nightclubs:

you can’t buy it by the bottle, well you can buy it by the bottle but you’l leave it on the table and it’s likely not to be there when you come back. ... It could have been doctored or whatever ... personally I just don’t find the club environment the sort of place I want to drink wine.

(FG6)
Wine was seen as physically too cumbersome and dangerous with regard to both the alcohol level and insecurity of the bottle to be considered as suitable for consumption in most night clubs, echoing the views of the trade wine buyers as to the physical problems associated with 75cl bottles of wine in most night clubs.

8.3. The Relationship between Price, Social Situation and Image Perceptions

Bourdieu was the first to suggest that wine can be used to demonstrate social, symbolic and cultural capital. His views have been extended to include mass consumption wines as well as fine wines by the work of Savage et al (1992), Groves et al (2000), Charters and Pettigrew (2002), and Charters (2004). The consumers were asked how their buying behaviour varied depending upon the social situation for which they were buying wine and how much they were prepared to pay for wine in differing social situations.

FG1 whilst having active social lives had a low involvement with wine, bought very little in general and were not sure about buying it for gifts in any situation. The other five groups all bought wine regularly to take to parties, dinner parties and as gifts. FG5 was the only group which said that it would not vary purchase price in these differing situations although they would choose the wine taken with regard ‘toward the person I was going to visit’ (FG5).

8.3.1. Mood

All of the wine buying focus group members agreed that they bought differently according to mood. For some drinking a ‘nice’ wine was something that they did when they were in a good mood but not necessarily if they were feeling less positive:

*If I'm really, really down and fed up and I'm on my way home, all I want to have is a glass of wine, I don't think I really think about it too much whereas if I'm happy I want to drink a nice wine.*
For others the searching out and buying of a ‘nice’, ‘special’ wine was a way of cheering themselves up

\[\text{You can't beat popping into Berry Brothers and having a little snifty around there, looking in the bin ends.}\]

The only group which did not directly link buying and or drinking to mood was the youngest age group, FG1. In the expert group (FG6) mood was almost completely synonymous with occasion, a ‘slurping kitchen’ wine versus a ‘what/where/with whom I’m eating’ wine.

In groups 2 to 5 inclusive, all participants showed a strong tendency to consume ‘nice’ or ‘cheap’ or ‘fruity’ wines if at home without friends around according to their mood, but only the male members of the consumer groups used buying wine as a way of spoiling themselves as well as consuming it. FG6 was the only group in which the female participants did not identify something else that they would prefer to buy if they wanted to cheer themselves up, i.e. chocolate or shoes; as one female participant explained [the activity of] ‘buying the wine for itself does nothing for me whatsoever’ (FG4). Olsen et al (2003) suggested that ‘self-confident consumers were willing to purchase a more expensive wine [for home consumption]’ (Olsen et al 2003, p. 49); their study did not investigate whether or not this self confidence was gender influenced. Wine Intelligence (2002) suggested that men were more confident wine purchasers than women.

**8.3.2. Male versus Female Buying Behaviour**

Gender differences were also identified with regard to buying across all groups except the expert group. Where a participant was part of a couple most of the overt and all of the specialist wine purchasing was done or believed to be done by the male member of the partnership. This contrasts with a widely held trade view that 60-70% of wine buying in supermarkets is done by
women. FG1, as already established, did not buy significant amounts of wine but commented on their parents buying habits producing a general consensus that ‘my Dad definitely buys more wine than my Mum, and is more interested in it’ (FG1). They also observed:

*my Mum’s got a bit of a silly attitude about it. She’s got a teenage girl’s attitude about it. She doesn’t drink irresponsibly but she’s “I don’t care, I just drink it” ... she pretends. I’m sure that with the amount of good wine that she’s been exposed to via my father she’d have a bit of a rude shock if she was forced to drink Lambrusco or something.*

(FG1)

They were commenting upon household roles that they had observed. Savage *et al* (2001) and Cockburn-Wootten (2002) show that men and women have differing social roles within households often based upon the different domestic activities with which they engage. Thomas and Pickering (2002), Hoffman (2004) and Mitchell and Hall (2004) showed in their New Zealand based studies that men and women bought differently from wineries and supermarkets. Gender buying differences were repeated for the majority of partnerships in every focus group where participants were in partnerships whether or not the partner was present. Groups 2, 3, 4 and 5 made several comments such as:

*I don’t really buy it but that’s because my husband buys it quite a lot and he’s an enthusiast and I don’t really know what to buy, but if I am buying I’ll go for an average price.*

(FG2)

My sister was the link person for FG4. She was one of the women who denied buying wine but having shopped with her in the past I knew this to be untrue. After the focus group was over I asked her why she had made the comment and she explained that what I had seen her buy wasn’t wine it was part of grocery shopping, just to have something in the house for daily drinking. Wine was what her husband bought, even though he didn’t drink it except with meals because he preferred beer. She said that he bought wine because he was male, because an interest was part of his ‘boys club’ (FG4) ritual along with being able to talk about cars and sport. She was amazed that I didn’t know this, but I am a single female.
Analysis / reanalysis of the focus group discussions showed that this behaviour was exhibited in all except the expert group (FG6), including the pilot and those focus groups that took place before FG4. All groups had members, or parents, who exhibited gender differences in this way at some level although there was some variance in the rationales for the behaviour. Subsequently I asked many people, friends, family, peers and many other groups I came into contact with about this behaviour and they all confirmed its existence to varying degrees. The only group in which some members denied that this behaviour existed at all were a group of wine educators with whom I went on a study tour.

The main explanation for this gender behaviour was deference to a male role which often included an assumption of superior male knowledge:

I tend to leave it up to my husband because he enjoys knowing a bit about it and choosing the wine and he tends to know the sort of things that I like so I sign the whole task over to him.

(FG3)

There was also a perception that since the man paid for it he should choose it:

Because I normally do the shopping, if there are certain deals on, ... I would get those but normally Andy [husband] buys it all ... and Andy pays for it all too.

(FG4)

I buy it ... because I'm the one with the money and I'm the one who drinks it and I'm the one who knows more about it than the other one in the party [his wife].

(FG5)

This buying pattern was repeated even if the man was not the main consumer of the wine and in households where the man was not the only income earner, confirming the findings of Vinexpo (2001) and Williams (2003) that men and women buy differently and with differing levels of confidence.

FG6 did not conform to the norm with female focus group participants being as involved in the buying process as the male participants. This could be because only two of the participants were
in permanent relationships and both were male but is more likely to be because of the high level of active involvement in this group as a whole.

8.3.3. The Image of Wine

All of the focus group participants agreed with Ehrlich (2002) that wine was not perceived to be a beverage for abusive drinking, drinking just for the sake of getting drunk. They did comment that whilst it could be used as such it was not normal:

> if you see someone, which I have once, on a railway platform drinking wine straight from a bottle and getting absolutely legless. It looked very strange, I thought "what are you drinking? It's not cider, its wine!" and it looked quite odd.

(FG6)

There was a general perception that wine was classy and more sophisticated in comparison to other alcoholic drinks, it was also closely associated with food:

> it's more a drink that is associated with food, in a sense with a quality, with the quality end rather than knees up behaviour.

(FG3)

Since wine has only become easily accessible and widely drunk since the 1970s it may be that the sense of exclusivity has lingered in the common culture long after wine has for most people become an everyday product. This image is retained via reification because of a very small number of fine wines which reinforce the expensive, aspirational and sophisticated image in the same way that Bourdieu was not able to see the common wine drunk in France but only fine wines used for elitist purposes.

There was a view held by parents of just pre teenage and teenage children that drinking wine with food was a very positive way of introducing their children to alcohol and it was an activity mentioned by FG1. It was considered positive because if all alcohol was forbidden ‘they’d be behind the bike sheds doing the WKD’ (FG5), but the very activity of giving wine to teenagers during a meal would then mean that the wine consumption has the potential to become a rite of
passage i.e. an acknowledgment that the child was starting the transition into adulthood, unconsciously perpetuating the sophisticated socialising image of wine.

Whilst wine was generally considered to be a positive sociable, sharing activity associated with food, talking and conviviality several groups also identified other forms capital mentioned by Bourdieu and discussed in relation to wine by Wright \textit{et al} (2000) and Charters (2004); Wright \textit{et al} and Charters did not discuss the gender behaviours apparent in this thesis. The consumer focus group participants identified that wine could be used as ‘another accolade to who you are’ (FG2) and described a cultural and financial exclusivity demonstrated by some wine consumers, particularly men:

\begin{quote}
\textit{my ex-boyfriend and his friends were all wine, not even snobs, but just bores. Like when they were trying to get wine over the net “I’ve got a bottle of ’96 Dom Perignon at home” and it wasn’t interesting to anyone but themselves and they weren’t even interested in the wine itself it was just to get a point.}\ 
\end{quote}

(FG2)

FG4 suggested that there was ‘nothing more boring than someone banging on about wine’ and FG6 suggested that many of those who demonstrated this behaviour knew little about wine:

\begin{quote}
\textit{he said “I like Montrachet and other wines from the Loire” ...a bit of an idiot really... It’s a bit of a macho thing knowing about wine.}\ 
\end{quote}

(FG6)

This is a variation on the work of Bruwer \textit{et al} (2002) because whilst it supports the theory that there are consumers who are not worried about making mistakes, it identifies a sub-group who deliberately display wine knowledge, not always accurately, to demonstrate cultural capital and elitism. FG4 also identified wine being used in restaurants to demonstrated conspicuous consumption:

\begin{quote}
\textit{I once tasted a wine a few years ago it was £1000 a bottle. It was a magnum and these guys we were out with were ridiculously wealthy and they were buying all this wine and it was a St Julian and it was a ’97 and I remember looking at the label and it was a delicious wine but it was £1,000 a bottle ...I remember thinking some of the wines I’ve tasted at home for £20 or £30 were not dissimilar to this £1,000 bottle of wine which made me realise that spending that amount of money on a bottle of wine, it was just insane.}\ 
\end{quote}

(FG4)
There was an awareness that wine snobbery exists but most of the wine expert group, including myself, whilst accepting that they knew more about wine than most members of the general public also felt that they still had a lot to learn and therefore chose not to display their knowledge generally unless ‘put on the spot’ (FG6). They only discussed wine with friends who had the same hobby or:

*there’s some people in work who do know wine and appreciate wine and we do talk on a one to one basis about what we like and what we don’t like.*

(FG6)

They were not particularly interested in discussing wine with those people who were not interested in wine *per se*; it was felt that everyone should ‘*drink what you enjoy*’ (FG6). The wine knowledgeable consumer in FG4 made similar comments. My experience confirms this type of behaviour; that those who know the most about wine discuss it least in non wine related situations in order not to be considered boring or a snob and to prevent themselves getting into a conversation with someone, usually male, determined to demonstrate their ‘superior’ knowledge.

This data along with comments from consumers like Micheal Winner suggests that there is a group of high involvement, probably high spending, probably male consumers with less knowledge than the experts that can be identified. This group is also posited by Johnson and Bruwer (2004) when discussing those who will not pay under $15 AUS for a bottle of wine; this group publicly consume wine demonstrating an extreme form of elitist behaviour as well as cultural capital. They have less intrinsic interest in the object wine than wine experts and demonstrate a different kind of cultural capital from them.

It may be that the wine experts or buffs identified by the trade wine buyers, Mintel and Wine Intelligence actually consist of two sub groups, both showing high involvement in the object, wine, and both prepared to pay well above the national average for wine; one group for whom
gaining wine knowledge is the goal and the other for whom demonstrating the cultural and financial capital of wine is the purpose.

8.3.4. Wine as a Gift

Wine in general was seen as a good present for those whom you did not know well and would not generally buy a present, ‘partners’ relations at Christmas’ (FG2). Champagne was considered to be a good present or stand by present for special occasions or celebrations such as an engagement party even by FG3 who felt that the Champenois ‘they’ve managed to corner the market of celebrating’ and didn’t ‘like that kind of exploitation of the event by the marketers’ (FG3).

There was general agreement amongst the five groups that bought wine as gifts that they enjoyed receiving it and FGs 2, 3, 4, and 6 confirmed the trade wine buyers’ views by agreeing that they traded up when buying gifts. How much they traded up depended upon the recipient’s wine knowledge:

\[
\text{if you’re going to be buying something for someone and they’re not going to have a clue, then I wouldn’t be spending over £9.99 for it because it’s wasted because they won’t have a clue how much it’s worth.}
\]

(FG6)

There was consensus that they would try to match the wine to the recipient:

\[
\text{I would try to buy something that is going to be like the wine they like but possibly something they wouldn’t, something that’s kind of a treat but I know will still please their taste.}
\]

(FG3)

The participants felt that this was a universal behaviour and that ‘no-one would buy you just anything’ (FG2) for a gift, so it was also a good way of expanding their own wine knowledge base, thus confirming the work of Pham et al (2001) that friends had a significant influence upon wine related behaviours.
The participants did not show any of the stress suggested by the trade wine buyers and Mitchell and Greatorex (1989) when talking about buying wine but rather confirmed the findings of the Vinexpo Studies (2003), Williams (2003) and the wine journalists. The consumers behaved in ways suggested by Christy and Norris (1999) and Ravenscroft and Van Westering (2000) by actively seeking out new and interesting wines with and for their friends.

8.3.5. Parties and Dinner Parties

It was agreed by all that there are some parties where quantity not quality is what counts, a barbeque or type of party where food is incidental to drinking and socialising. In this case it would be quite reasonable to either take your 'normal wine' (FG4) or 'get a couple or three for a tenner and a great big crate of lager' (FG2). This was the public behaviour described at these types of events but female consumer group participants also identified a private form of behaviour which I also indulge in. Several participants would:

*always buy a wine that I like because I think it will probably be the only one there that I do like.*

(FG3)

The would then either open it up themselves when they arrived so that they could drink it and/or open it and hide it in a corner so that they could go back to it later to top up their glass.

At a dinner party two forms of wine buying were identified. Either the host would have chosen the wine to go with the food in advance of the party or they would be expecting to drink what the guests took along. Where the host had provided the wines there was a view that:

*you still have to take something that's respectable because at some point he's going to look at it when you're not there.*

(FG4)

The focus group participants, conforming with Randall’s (2002) emotive and lifestyle findings, did not want the wine that they had taken to make them look bad, it had to explain itself even when they were not present; this does not agree with the trade wine buyers who suggested that
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consumers trade down in this situation. The consumers did agree with the trade wine buyers that when the wine was going to be drunk at the meal with them present it would always be ‘a slightly better bottle’ (FG4) than their normal wine.

FG6, the expert group, displayed one additional behaviour which I also participate in:

if I was taking something that was very nice I’d hope I’d have a glass of it rather than go into the cellar of whoever it is.

(FG6)

In fact, since they had all had occasion to find that a wine they had taken to drink on a specific occasion was ‘tucked away for himself’, they all had no qualms about either phoning up and finding out what the food was and matching their wine to the food nor about telling the host that this was a special bottle that they wanted to drink it with them that evening. They only did this where they knew the host quite well being aware that at other events their wine ‘maybe put away’. In that case the wine would have been bought with that possibility in mind and the wine would not be special to them as the giver but would be suitable for the event and host.

Whilst authors such as Randall (2002) have identified trading up for dinner parties and gift giving, the hiding of wine and almost forcible matching and consumption of their wine choice by the experts has not.

8.4. Price Ranges

Although being aware that they traded up for gifts here was a discrepancy between the amount that the consumers in these focus groups believed that they spent as an average amount per bottle of everyday wine (£4 minimum off-trade) and the actual national figure, £3.75 (Key Note, 2004). ACNielsen (2006, p. 140) shows that most price promotion purchases take place in the north of the UK and since the focus groups took place in the south and south east this could explain the discrepancy. As Lyon (2004) observed the same phenomena it could also be that
since most of the consumers did not see the supermarket purchases as 'proper' wine shopping they were not aware of what they actually spent per bottle and just assumed a figure which sounded like the kind of figure they would like to think that they spent.

8.4.1. Off-Trade Purchases

There was great reluctance in all of the focus groups to say that they spent less than approximately £4.00 a bottle with £4.00 to £8.00 being the most commonly mentioned range. The reason given for not buying in the £3.00 or under range was that the wine was perceived as being too cheap and therefore potentially of lesser quality:

> if you see a wine that's £2.98 you might feel that if you buy that it might be a big mistake

(FG5)

The exception to this was if the purchaser had tried the wine before and therefore knew that they liked it:

> if it was something I've had before I'll give it a go, but again I don't think I'd trust a wine I didn't already know in those circumstances.

(FG3)

The most commonly cited price for everyday drinking was £4.00 to £5.00 because:

> there's so much competition now with people going over to France for less than a fiver or around a fiver, you can get a really nice white wine for everyday drinking.

(FG4)

The £8.00 price was cited more as weekend or special occasion drinking concurring with Mintel (2002 and 2005) that consumers often trade up for weekends and special occasions.

Most of the consumers felt that they did not have the knowledge to buy over £8.00 unless they were able to taste the wine first 'if I taste one I really like I will buy it but I don't like to buy to speculate' (FG3) confirming the work of Johnson and Bruwer (2004) that tasting could be an important factor in increasing purchasing price.
Members of several groups commented that if wine was on promotion, in a supermarket of the consumer’s choice then ‘when you get £7.00 bottles of wine reduced to £4.00 they’re very good’ (FG5) and they would buy. The expert group (FG6) commenting that their range for this could go down as low as £2.49 to £3.50. FG6 also had the widest buying band because they would both lower and raise their buying price if ‘something caught my eye’ (FG6) because ‘it’s not just about enjoyment it’s educational’ (FG6). This would agree with the work of Bruwer et al (2002) that highly involved consumers display very sophisticated buying behaviours both raising and lowering their buying price according to their reason to buy.

8.4.2. On-Trade Purchases

It was acknowledged that champagne could be around £35 to £40.00 and most people would spend that if there was a special occasion but under normal circumstances in a restaurant the wine that was bought was either house wine or in the £15.00 to £20.00 price range, average on-trade bottle price is approximately £15.20 (Wine Intelligence 2003, p. 06). The reason for this was the mark up, see table 6.1, which most considered to be ‘outrageous’ (FG3):

*a 4.00 bottle of wine is trebled, at least trebled and I think that if you’re going to buy a really nice bottle of wine then you’re better to drink it at home.*

(FG5)

Many of the focus group participants felt that because of this mark up:

*it’s nice if you have dinner parties to have nice wines or if you’re going to a dinner party to take a nice bottle, for whatever you pay in a restaurant you’d get an amazing bottle of wine from an off-licence or supermarket.*

(FG2)

One male member of each FG3 and FG4 both said that they had and would pay up to £50 for a bottle of wine in the on-trade although even for them this was not the norm. The focus group member of FG4 was the consumer who had their own wine cellar and the other focus group member (FG3) said that he would spend this money only at a specific hotel because:

*they’ve got an excellent wine list and the mark up is, I think, £5.00 to £10.00 however expensive the wine is so I’m happy to pay.*

(FG3)
FG4 confirmed the wine purchaser's view that it isn't the on-trade mark up \emph{per se} which was perceived to be the problem but the price / quality relationship particularly in pubs without food where the quality was already perceived to be likely to be low:

"You're stood in the pub and they pour it out of the bloody wine boxes"
"And then charged £6 [per glass] for it"
"You're being ripped off then, at least in a restaurant you're getting your own bottle"

(FG4)

This would seem to confirm the views of the wine producers, Wine Intelligence (2003) and Catchpole (2004) that consumers will trade up but only when they feel confident that they are getting value for money.

\section*{8.5. Buying Wines; Influences to Buy Including Staff}

A variety of sources and premises for purchasing wine were mentioned in all of the focus groups ranging from supermarket shopping to trips to France, from mail order to specialist off-licences, pubs and restaurants. None of the consumers bought wine from a single source or type of premises but all of them bought some wine from supermarkets and off-licences and they all bought in restaurants. They discussed what onsite activities influenced their decision making at the moment of purchase these included point of sales information, price considerations, the occasion and in specific cases interaction with staff.

\subsection*{8.5.1. Supermarkets versus Specialist Off-Licences}

The experts from both the expert group and the member of FG4 agreed with Lyon (2004) and the wine journalists that in general supermarket ranges were boring because:

\emph{They've got to maintain a consistent output and it tends to be quite bland compared to wine from smaller producers.}

(FG4)

\emph{With Tesco's for example, the range of wines, but it's the same range of wines. You go there week after week and it seems to be the same thing that they're selling.}

(FG6)
Whilst this consistency of flavour and style as identified by Charters (2004) provides safety and reassurance for the novice or low involvement consumer it could also be the reason for the general consensus from all of the high or moderately involved focus group participants that when buying special occasion wines they would actively seek sources other than supermarkets.

Most of those who discussed buying wine from supermarkets were female. As well as being influenced by the occasion and point of sales information they were also influenced by promotions such as ‘*Waitrose wine of the month*’ (FG2). There was mention of buying on price reduction promotions in FG3, FG4 and FG6 but it was not widely discussed. There was general agreement that promotions were used to assist in buying ‘*everyday drinking wine*’ (FG4). ACNielsen (2006, p. 49) shows that in 2005 whilst 51% of wine bought on promotion was bought on price promotion 41.8% was bought on a Multibuy /Save promotion. This confirms MGC3’s view that promotions did not have to be price reductions in order to increase wine sales, they just had to be perceived as an extra value purchase and make purchasing easier for low involvement or busy consumers.

Wine bought in a supermarket was part of the ‘weekly’ or ‘monthly’ shop and whilst one focus group member said that she felt ‘*overwhelmed a bit*’ (FG2) by the range of wines available in the supermarket this was not a problem since she liked the challenge confirming Christy and Norris’s (1999) view that there are consumers for whom risk is a stimulation to purchase. All of the consumers except those in FG1 vigorously repudiated the trade wine buyers’ view that buying was stressful and agreed with the wine journalists that it was not unduly stressful. Female members of FG2 and FG6 said that they tended ‘*to look at the tasting notes*’ (FG6) [point of sales information] if they felt they needed assistance in buying confirming Mintel’s findings (Mintel 2001) that point of sale information was the only marketing material which correlated directly with purchasing activity.
The participants confirmed that they did not feel stressed per se when buying wine unless the occasion they were buying for was very significant. In this case most said that they would either go to a specialist off licence or ask someone who knew more than themselves:

if I'm going to take wine somewhere, I'll usually go into an off-licence because I can get a bit more advice.

(FG2)

Specialist off-licences were seen as places to go for special wine or occasions because of the knowledgeable staff and the advice that they offered.

No participants felt that they would ever ask in a supermarket even in ones such as Waitrose where they had registered that there was a sign saying that trained assistance was available:

I've never seen anyone hovering in the wine section, so if they do train them up I don't know where they keep them.

(FG3)

The one exception to this was in FG5 where there was general agreement that although in most supermarkets staff would not be asked, in their local Co-op there was an exceptionally good member of staff, 'the only one I've ever come across was the lady in the Co-op, she was very very good' (FG5). All of the members of this group who used this supermarket agreed that they would discuss wine with this member of staff but all also that she was the exception. I have spoken with a trained sales assistant in my local supermarket, however it emerged in discussion that he was about to move onto another product category as this would help him with his career progression. I have not been made aware that he has been replaced in that retail outlet.

The notion of trust built upon positive personal interaction over a period of time was a significant influence to experiment and/or trade up and all of the focus group participants from the youngest to the oldest from the most inexperienced to the most experienced commented that they would go to a local off-licence whenever they wanted to buy 'nice' or 'good' wine and needed advice. The only national chain that was mentioned as consistently having good knowledgeable staff was Oddbins; all the other off-licences mentioned were local, usually
independent, and visited frequently. This behaviour was also observed in the comments of the one consumer who bought almost exclusively via mail order (because of home delivery). She had developed a trust relationship and was happy after reading the brochure to discuss and place her order with the retailer at the end of the phone. Even though buying by mail order, she still wanted that one to one discussion.

Mail ordering took place in all of the groups. Those ordering from traditional wine merchants, Laithwaites, Berry Brothers etc seemed to be positive about the experience and continued to buy periodically, but others were less sure. The trade wine buyer involved in mail order had said that he considered the knowledge of his staff to be a key factor in the businesses success and Quinton and Harridge-March (2003) showed that it was the traditional wine merchants who had most successfully transferred to selling wine via the internet because they had been able to transfer their specialist culture to this new medium.

FG6 commented that:

*I’ve never been a great fan of buying things like that just to try a bottle ... I will pay a lot of money, but I don’t like buying twelve bottles.*

(FG6)

FG6 also commented that the necessity to buy by the case, mixed or not, meant that the total purchase price was high which was a disincentive for some to buy even if this was the only method they had of sourcing a wine they were specifically seeking. Delivery problems was the other reason given by those consumers who no longer bought by this method.

### 8.5.2. In-store Tastings

Wine tasting as promotion to buy was generally seen as a positive activity confirming the work of Johnson and Bruwer (2004) and most of those consumers who had been involved in tastings had a favourable view of it having been influenced to buy wines from the promotion. However
the tastings only worked really well if the situation was right, i.e. some would not taste in all retail outlets because:

well, you've got your car so you don't want to be drinking on, an empty stomach usually, it would not be appropriate, it's not what you want to do.

(FG4)

Others would only taste if the person doing the tasting seemed to be genuine, 'passionate' or 'knowledgeable' about wine or just that wine. This would echo the work of Gluckman (1990) and Goode (2005) who argued with Johnson and Bruwer's (2004) view and suggested that tastings work best when they are held in a 'normal' wine consuming situation. Some of the trade wine buyers had also commented that some of the tastings they held might be inappropriate and the staff not as knowledgeable as they could be.

FG6 felt that in-store tastings were probably aimed at 'targeting people who don't know an awful lot about wine'. The wine used for the tasting was often a branded style or flavour with which they were familiar and so not of sufficient interest for them to bother to try it from one of 'those plastic things [glasses] (FG6) which did not help the wines' taste. They agreed that it might stimulate low involvement consumers to make an experimental purchase if they liked the wine tried.

8.5.3. On-Trade Buying

Pubs and restaurants were the two main types venues discussed for buying wine in the on-trade. As previously discussed pubs were divided into food premises where the wine could be good and non food premises where it was likely to be bad and so less likely to be bought; a simple price / likely quality estimate could be made very easily followed by the decision to purchase or not. This was a relatively simple and stress free activity, therefore most discussion about on-trade buying took place in a food / restaurant environment which Hall et al (2001) showed is a very complex environment.
There were two types of restaurant environment identified; those where the staff would know about the wines, in which case most people would ask and those where the staff would have no knowledge. All participants considered that most of the time they would buy wine to accompany their meal. They also agreed that buying wine in a restaurant was much more stressful than buying in the off-trade. As a result of this stress some had developed various strategies to make ordering easier in this very public situation. The strategies described were; handing over the list and responsibility to another person, usually female to male; following instructions handed down by fathers, 'to buy the second cheapest' (FG3) or to buy five categories down from the top; choosing a grape variety or wine name that they are familiar with and like; and finally when convinced that the mark up is outrageous just stick with the house wine:

*I know that I like certain grapes and it's nice just experimenting with new things .. and the advice that my dad gave me is, if you're really stuck try to offer it [the wine list] to someone else to do, but he said if you count five down on any wine list, you're going to be okay price wise and not extortionate, and the bottle that you're ordering will be nice.*

(FG2)

As a result of these strategies none of the focus group participants admitted to a level of stress which precluded buying but more women abdicated responsibility for buying wine in restaurants than men supporting the lack of confidence identified by Wine Intelligence (2002).

Some members of the expert focus group identified one other activity which took place especially in mid range independent restaurants locally. They would not ask the staff for advice but would look at the wine list and identify the supplier. If they recognised wines from a supplier whom they considered good they would buy from anywhere on the list, but if they thought that the supplier was poor for any reason they would buy an internationally recognisable restaurant brand at a price which they felt was reasonable value for money. This is also something that I do. The pressure of buying in the on-trade was summed up by FG4:

*I've always remembered if you ask someone or allow someone to choose a wine you are then at their mercy aren't you?*

(FG4)
The types of restaurant where the focus group participants would ask wine waiters or sommeliers were upmarket or specialist restaurants (the white table restaurants of the trade wine buyers) and despite the strategies previously identified some still experienced significant stress when ordering wine because of previous experiences:

*I've made a fatal mistake before of asking the advice and being given the advice and the bottle being far far more than I could afford but being too embarrassed at that point and I couldn't go back.*

(FG2)

Those trade wine buyers who were sommeliers had commented upon this problem, that in order to build up trust and maybe encourage the customer to experiment in the future, the first set(s) of advice had to consider the likely price range that the consumer probably wanted to spend within and even possibly, as FG4 preferred, make more than one recommendation with the prices before the final wine selection was made. Amongst those who ate out regularly in independent restaurants when trust was established the consumer group participants were happy to trust the sommelier to make the choice entirely on their own and enjoyed *'the adventure'* (FG4) of this activity as a way of finding out about new and unexpected wines. Olsen et al (2003) noted this behaviour but only when in a restaurant for social reasons, they showed that the person hosting a business meal would be likely to make a very conservative, safe, choice because of the context.

None of the participants would ask staff for help in chain restaurants except the one who had a medical condition. She felt that in reputable chain restaurants with limited lists the staff were able to describe what was on that list sufficiently for her medical needs. All other participants, especially when ordering in pubs and bars had found the level of knowledge far less useful or relevant:

*it's the level of people you are dealing with, they've very little in the way of staff training if anything, they're just warm and willing, or more or less willing, bodies aren't they? And you've got to take that into account.*

(FG6)
This did not mean that they would not order wine in these national chains (pub or restaurant based) but that they felt that it was only worth making experimental orders if they as the customer knew exactly what they wanted to buy and could make an informed estimate of the likely price quality relationship prior to purchase. Where the focus group participants could not do this they would always make a safe choice. This could include choosing another type of drink, especially in a pub, choosing the house wine or looking for a name (country, grape variety, or producer) that they recognised and then considering the mark up. As previously discussed they would avoid buying or trade down where they perceived the mark up as being unreasonable displaying the price sensitivity that the wine producers had discussed.

8.5.4. Labels and Presentation

All participants in this research process were concerned about labels and the appearance of wine. Physical attractiveness was considered to be very important in the choice of one wine over another especially in the off trade and to assist identification for repeat purchases.

The problem with the physical look of a bottle or label was its subjectivity. As Mintel (2001), Halstead (2002) Wine Intelligence (2001) and Lechmere (2005) showed what looks good to one person may not send out the same signals to another; the difficulty is in getting 'behind the label' (FG6). The expert group were prepared to over look labels which did not appeal to them if they thought that there would be a good value wine in the bottle:

> you have a wine that turns up in Waitrose, the Naked Grape, behind which is a illusion producing a very good Riesling .... You can find behind these funny labels, these generic labels, actually some good wine at a reasonable price, and I don't dismiss the idea that you don't get wines of quality that don't on first appearance seem particularly good.

(FG6)

But they would need some additional sign or symbol to make the first purchase. They also commented that:

> I used to avoid labels that looked like too much marketing went into it, a big marketing budget. I know now I've changed my mind because sometimes it can be good if they're
going to spend a lot of money on their marketing they're also spending money on producing good quality grapes and making good wine.

(FG6)

This would confirm the views of the wine producers that bottle presentation and or promotion only gets the consumer to try the wine once, it is the quality of the wine in the bottle and the price quality relationship makes the consumer buy a second time.

Comments from all the focus groups would seem to confirm the view of Gordon (2001), Williams (2001) and Lechmere (2005) that high quality wines need to look traditional, 'that looks expensive ... it looks traditional, it looks like it should be dusted'; (FG2), 'I reckon that Geoff Weaver looks expensive ... it looks like more quality paper' (FG3). It also confirms Mintel (2001), Halstead (2002) and Wine Intelligence (2001) who suggest that jokey names can prevent purchase by more serious wine consumers because of the image they perceive the bottle displaying. This would always prevent the purchasing of that wine as a gift unless the giver could be sure that it would be understood as such, a joke.

Whilst the wine producers and wine journalists had stated that the back label was an essential, relevant and cheap marketing tool, the consumer focus groups were more ambivalent. Some consumers liked back labels and some preferred wines without them because 'it assumes a certain intelligence on the drinker's part' (FG1). Those who felt they knew about wine felt that no back label was likely to mean that the wine was traditional and if without a barcode more exclusive Those who knew less used the back label to give indicators of what the wine might be like or to remind themselves of the flavour if they had forgotten. There was a caveat as FG5 noted:

_the back label has been written by the wine producer isn’t it? It’s not going to say this wine is crap, it’s going to say it’s good._

(FG5)
This reflects the views of Chaney (2000b) and Murphy (2003) that the words used on back labels may not be a precise description of the wine but may rather be seen as suitable positive marketing terminology, Thomas and Pickering (2003b) and Brochet and Dubourdieu (2001).

More of the women than men said that they would not buy wine without back labels and that they used them consistently:

*I couldn't trust myself with the picture, I'd most definitely look at the back if it was full-bodied or whatever the description.*

(FG2)

Again this would confirm the work of Vinexpo (2001), Thomas and Pickering (2003a) and Wine Intelligence (2002) that men generally feel more confident in buying unknown wines than women.

The only group to agree that they all, male and female, always read the back labels was the expert group (FG6) 'it's like buying a car without an instruction manual' when the back label was not available. They also agreed that EU wine quality regulations on front labels helped to provide information about the wine. Label presentation *per se* was of least interest to this group perhaps because their basic knowledge was above average; paradoxically this was the group most likely to always read the labels because their interest and curiosity was higher than other groups.

I am influenced by what I perceive to be an ugly or gimmicky label or presentation and would not generally buy that bottle unless there was a strong quality cue on the back or front label. I always read both front and back labels or use personal recommendation from a person whose wine knowledge I trust.
8.5.5 Brands

All of the focus group participants were aware of what a brand was i.e. Hardys or Gallo but they were also aware that they used other terms such as grape variety as synonyms for ease in discussion and purchasing. Whilst they were aware of brands the majority of the focus group participants were not aware of brand ladders and so would not consciously seek to buy a higher priced wine from the same brand series or another more expensive brand from a company they were familiar with when wanting to trade up into unknown territory. Only one participant, from the expert group (FG6), could identify any company's brand ladders. She preferred the lower priced brand and did not consider the more expensive brand worthwhile:

*I'd rather buy the Stamp series rather than the next one up, even though it's more expensive.*

(FG6)

Supermarket own brands were viewed in the same way as the supermarket, those who shopped from Sainsbury's would buy their own brand and those who disliked the supermarket chain would view their wine less positively, 'I would buy Marks and Spencer's wine, I don't know about Tescos' (FG2).

FG2 commented:

*I know that I like New Zealand Sauvignon Blanc but it won't matter much what the brand is but if it's a Sauvignon from New Zealand, I'd probably quite like that.*

(FG2)

FG2's statement confirms the findings of Aitchison (1999), Chaney (2001a) and Halstead (2002) that a country or region can be seen by moderately involved consumers as a brand in its own right, it also suggests a perceived homogeneity of style for countries for less knowledgeable consumers i.e. all Australian wines are perceived as fruity and simple; perhaps it is this perception that makes them appear boring for involved consumers.
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Asked whether or not brands repelled or assisted in purchasing the consumer groups responses again reflected the findings of these authors; those with low involvement were positively motivated to purchase by the security of a brand whilst high involvement consumers were often repelled:

*I buy away from brand names ... because I want, I’m always looking for innovation and because I think they’re, I’ve had so much more interesting wines*

(FG3)

The reason given for being repelled by branded wines was that it was ‘so mass produced’ (FG2) confirming that wine needs to have a ‘natural’ artisan image for many buyers. Underneath the rejection though, there was a level of agreement that if ‘there was one there that I recognised and I’d had before and liked it’ (FG3) many in the focus groups, particularly female participants, would buy this branded wine again but only for use in a specific way:

*I’d buy branded and quite often do for drink and for people on the off chance if they pop in but I wouldn’t take it to someone else’s house because it is such a snob thing.*

(FG4)

Branded wines were wines that could be bought along with the general supermarket shop and used for home and informal consumption but not for gifting in any form as this did not give out the correct image.

The expert group (FG6) again reacted slightly differently:

*I think it’s the psychology in that lots of people want to think that they know a little bit about wine, it makes them feel good if they think they know a bit. When they go to a supermarket and they see a name that they know, recognise it, “Hardys I know that wine, oh yes that’s a good wine”. They then tell themselves it’s good wine just because they’ve heard of it before.*

(FG6)

They agreed that branded wines did have a place in assisting the novice or low involvement consumer in buying and agreed that the word ‘brand’ had many overt and covert meanings.

FG6 was the only group which disagreed internally about buying branded wines. Some would never buy them avoiding ‘the name rather than the actual wine’ in the bottle, whilst others:
would try something like that now and again ... usually because they are cheap and if I'm trying to save money. I would say I'll try this and if I don't like it it won't be bad [low financial loss].

(FG6)

This sub group would be trying the wine both for financial reasons and for educational purposes. This group displayed both cultural elitism and pragmatism in their very sophisticated purchasing patterns.

8.6. Media Influences

All of the focus group participants agreed that they were probably influenced by media but were only able to give a few examples of it consciously happening. Studies by Chaney (2000a) and Hoffman (2004) show that whilst advertising budgets are in decline wine consumption is increasing and Lockshin (2004b) suggests that 60% or more of UK wine consumers buy without conscious thought or planning.

8.6.1. TV and Radio

All of the focus group participants were aware of sponsorship on TV, although they were not necessarily sure if it was Gallo or Jacob's Creek which was supporting programmes such as Friends. They all agreed that it would only influence purchasing if you 'associate with all the people in Friends' (FG1). The wine producers had said that they had chosen programmes to sponsor because the demographic profile of consumers who watched those programmes matched that of their wine image; FG1 found the sponsorship off putting as they felt only girls would want to emulate the TV actresses.

FG4 and FG5 found themselves reacting negatively to direct TV advertising, both commenting that the adverts remind them of bad quality wines, 'is that because all of the [wine advertisements] that we remember have been bad ones?' (FG4) or more currently 'the only wine that's really pushed is Le Piat d'Or and it's absolutely rubbish' wine (FG5). Halstead (2005)
found that TV was the only direct advertising media with a significant recall of the wine advertised; this is a problem if the wine recalled is disliked. It was also commented that only big mass produced brands could afford to advertise in this media.

At the time of interviewing BBC Radio 4’s Good Food programme was running a six week series on good wine, which encouraged consumers to taste alongside expert presenters on the programme. FG1 and FG2 did not mention radio advertising but all four other groups mentioned this series, at least one person in each group having listened in to a programme. The general comment was:

*I’ve heard it several times, but each time I’ve heard it I thought “I must remember that and go and buy it” ... I forget then what he’s said, but I find it really interesting to listen to.*

(FG5)

Those who heard the programmes really enjoyed them but there was no follow up acknowledged possibly, they suggested, because listening to the radio was often ancillary to some other activity such as driving and so the listener could easily be interested whilst not being fully engaged. This suggests that Randall’s (2000) findings could also be applied to radio programmes.

### 8.6.2. Weekend Newspapers and Non Specialist Magazines

All of the consumers were aware of wine writing in weekend supplements. Most did not set out to read the supplements but ‘if it’s there I’ll read it’ (FG2). Another common feature was:

*I read things in the Sunday Times sometimes, the wines and this and that and I think that it’s interesting, but I don’t buy the wines. I read it, notice it, but I don’t buy the wines.*

(FG4)

Two reasons were given for this behaviour; one that most people had forgotten what the wine was when they were actually buying wine next; secondly all groups apart from FG2, which was London based, said that the wines written about were not generally available in local retail outlets despite the wine journalists belief that they wrote about wines which were available
nationally; whether this was a myth or they had tried in the past and not been able to find the wine locally was not fully established. Either way this supports the research from Mintel (2001) that whilst consumers read and absorb information on wine it has no conscious impact on their behaviour.

8.6.3. Books

Those with a high involvement had wine books which they tended to use for reference purposes. Most of the expert group had ‘tons of reference books’ (FG6) and read specialist magazines such as Wine and Decanter. Some of the other participants, mostly male, had some reference books and there were others with moderate involvement who had been to wine tastings, enjoyed them and then found that:

when you tell your family you’ve been to a wine tasting, everybody gives you wine books ... they’re interesting to read ... what I don’t do is use them as a reference to go out and buy.

(FG3)

The reason given for this is:

probably to do with what the wine’s about perhaps, its associated with relaxing and unwinding and not being entirely on the ball with checklist, reviews all completed.

(FG3)

It may be that these consumers are similar to those identified by Bruwer et al (2002) as being confident to buy but not too worried if the purchase is not fully successful or more probably the group identified by WJ5 and most members of CWTC who enjoy finding out by tasting but are not prepared to do any other ‘work’ to increase their wine knowledge.

8.6.4. Wine Journalists

Groups 3, 4, 5 and 6 were all aware of various wine journalists, some of whom were interviewed for this thesis. Like the wine journalists the consumers considered that whether or not they were influenced to buy following a recommendation from a specific person could be compared to a film review not necessarily positively though:
it's like films that win the Oscars are usually not films that I think are any good or the ones that get really good reviews. (FG3)

On the other hand

Jane MacQuitty is it from the Times, is really good. I follow her sometimes (FG4)

Where they had had a good experience in following a wine journalist’s recommendations they would follow in future but where they have not liked the wine or agreed with the description they would be sceptical about their reviews in the future. This would agree with the beliefs of the trade wine buyers and the wine journalists themselves.

8.6.5. Competition Winning Wines and Point of Sales Information

All of the consumer focus groups confirmed the work of Peattie (1995), Orth and Krska (2001) and Lockshin (2004a) by agreeing that their actual purchase was affected by wines which had won competitions ‘the gold ones would attract my attention at the right price’ (FG4 member with own cellar). Even the expert group were influenced by medals although with a little more scepticism:

I’ve bought quite a lot of them, more out of interest to see what I think about them rather than expecting them to be good ... 50% I want to see what I think of the wine, to see if I’m disappointed or agree with the judges. So I read the competition, the one in the wine magazine, had a look through and then I’ve bought some of these wines, so it’s more of an interest. (FG6)

They also agreed with Mintel (2001) that they were influenced by point of sales information, although FG6 commented that the point of sales information could persuade me to buy it or not because of the actual words used:

it's its own language isn't it? Fruity, easy drinking wine and you think it's probably not for me because, you know, deep rich and complex [are preferred words] (FG6)
None of the focus group participants commented nor seemed aware that it was wine journalists whose words were often used as the point of sales information which they accepted did influence them. Neither did they seem to connect wine journalists with those who judged and awarded the competition medals which stimulated their purchases. Where the wine journalist worked for a national paper they may have registered this information and this may have positively or negatively influenced their decision to buy.

8.7. Development of Wine Knowledge and Relationship to Buying and Consumption Habits

FG1 felt that they knew little about wine now, but that 'we'll all grow into wine as we get older'. It was just assumed by the group that 'because everyone drinks wine' that they too would acquire the knowledge and taste as they got older just 'like beer, you have to acquire beer'. It was part of the social and cultural expectations of each member of the group.

FG4 said that:

*if I have a wine that I like, I'll talk about it and you obviously buy wine and you drink it and you like it, that's all you need to know about wine. If I'm talking about different grapes or whatever it's only what I've learnt over time, it doesn't mean I'm an intelligent wine drinker.*

(FG4)

They were suggesting that all you need to know about wine is whether or not you like it, however other participants suggested that holidays, holiday meals and holiday visits to wineries could all create a happy memory that would stimulate a positive reaction to that / those wines in the future. Conversely several consumers had done as several trade wine buyers had suggested; enjoyed a wine in a particular holiday context bought samples of that wine back to the UK and 'ended up pouring it down the sink' (FG4). This had negatively influenced their view of that country's wines although not necessarily permanently if they subsequently had another good experience in situ.
FG1 and FG2 did not feel that their taste in wine had changed much which may be a factor of their age. All of the other groups agreed that their alcohol drinking habits had changed significantly, particularly where they were old enough to have been buying alcohol since the 1970s. There were two reasons given for this, firstly changing tastes which influenced both food and drink:

*the reason they [children] don't like greens and things is because they taste say the acidity in green vegetables, it comes out on their tongues, that's why they don't like it and I think a similar thing as you get older, your taste buds change completely and what you did like, I was into sweet, sweet drinks, loved it, now I really don't like it at all.*

(FG4)

And secondly the availability of wine itself:

*I don't remember when I was young that you could buy the range of wines that you can see today from a standard supermarket, you'd have to go to a specialist shop.*

(FG3)

There was complete agreement that because wine had become so much more easily available, affordable and the range had increased their drinking habits had altered; this was regarded as a positive change. None were sure how or if their tastes would change in the future, but most felt that they would continue to experiment to some degree or another.

**8.8. Summary**

This chapter has presented the results of the consumer focus groups and has identified that there are areas of their behaviour where they agree with the perceptions of the trade wine buyers, wine producers and wine journalists and areas where they disagree sometimes quite strongly.

There are several themes which have been developed throughout this chapter;

- That the UK wine consumers do not always behave in the way posited by academics to date nor in the way that the trade wine buyers believe they do.
• That the situation or occasion for wine consumption is more significant to the purchase of wine than the price alone
• That gender influences buying behaviour in a much more sophisticated way than has been previously identified
• That UK wine consumers are on the whole sophisticated in their buying behaviour and do not find buying wines particularly stressful
• That, paradoxically, what might be a positive influence for one consumer may well be a negative influence for other consumers, or even for the same consumer in different circumstances
• That media influence is more subtle than previously supposed

The implications of this both for understanding the UK wine consumer and marketing to them will be discussed in depth in the chapter nine.
# Chapter Nine
Collation and Evaluation of all Results

## 9.1 Introduction

## 9.2 Factors Influencing the UK Wine Consumer Profile

- 9.2.1. Age and Lifestyle
- 9.2.2. Gender
- 9.2.3. Real Risk versus Reified Risk
  - 9.2.3.1. Financial Risk
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## 9.3 The UK Wine Consumer Identified

## 9.4 External Factors Moderating the UK Wine Consumer Behaviour

- 9.4.1. Media
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- 9.4.3. Promotions
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## 9.5. Summary
Chapter Nine

Collation and Evaluation of Results

9.1. Introduction

This chapter will collate and evaluate the findings of the four studies in this thesis, the trade wine buyers, the wine producers, wine journalists and the consumers; that is the results presented in the four preceding chapters. It will establish where there is agreement between the different study/stakeholder groups and where there is not evaluating the results with current literature. As this is a grounded theory based thesis the themes that emerge will form recommendations for further research; the final chapter of this thesis.

9.2. Factors Influencing the UK Wine Consumer Profile

This section will discuss those themes which have been identified as having a significant effect upon the development of the UK wine consumer.

9.2.1. Age and Lifestyle

The trade wine buyers suggested that age and the accompanying changes in lifestyle, moderated by the venue of purchase and consumption were the major factors in wine usage, see table 5.1. All agreed that traditionally consumers had moved into wine as the beverage of choice during their mid twenty to thirties but only half believed that this 'natural' progression would automatically continue, the others wondered if the introduction of FAB's and development of a later single lifestyle might inhibit this happening. None of the trade wine buyers seemed aware that before the 1970s wine had not been a mainstream beverage of choice for the majority of the UK adult population, that place was held by beer (NTC Publications Ltd, 2000). They also did not mention that whilst previous generations of wine consumers may have started to consume
wine by choice, rather than as part of dining rituals, in their twenties and thirties they were part of a particular economic social grouping, A/B. The older trade wine buyers may have been acting like Bourdieu when he did not mention the use of beverage wine only fine wine in that they too came from this wine drinking habitus, or aspired to it, and have subconsciously projected their behaviour and social norms across the adult population as a whole. For the younger trade wine buyers, as Featherstone (1998), Williams (2001c), WP1 and MGC2 discussed, their unconscious adoption and reification of wine trade mores because of their interest in and love of wine, may have encouraged them to adopt the traditions of this cultural group perpetuating and projecting the myth of traditional wine progression within one social group across the whole population.

Given the penetration of wine consumption within the current UK adult population, (81.5% of AB/C1 households and 69.8% of C2/D/E households, ACNielsen 2005, p.140), the expansion of the middle classes and normal generational transfer of cultural habits it may be that wine consumption is currently becoming part of the cultural norm for the majority of the UK adult population between the ages of mid twenty to mid thirty. Since the culture of wine usage throughout the UK population is a recent phenomenon there is no specific reason to assume that this is now an inculcated behaviour which will not change. The introduction of FAB’s in 1995, the rising amount of teetotal adults in the UK (18%, ACNielsen 2005, p. 34) and the reduction of wine drinking in traditional European wine consumption countries such as France, Spain and Italy (figure 1.1) suggest that there are significant challenges to the belief in an automatic development of a new wine drinking generation, which some of the trade wine buyers acknowledged. However in the UK wine drinking across all social classes is a relatively new social phenomenon and so does not, yet, carry any anti-generational baggage. The consumption of FABs is reducing (ACNielsen, 2006) and the consumer focus groups showed that there is a perception of most wine consumption as socially inclusive and sharing. This suggests that wine purchase and consumption will continue to rise because of specific identifiable phenomena, not
because it is an automatic natural progression. These phenomena also include generally positive medical research and the rise of:

* quite affluent mid-life single consumers and working females, both groups having relatively high disposable income to spend on discretionary purchases such as wine.  
(Mintel, 2005, p1)

Certainly within the younger focus groups FG1 in particular there was an absolute assumption that they would begin to start drinking wine more seriously in the future and none of the focus groups saw themselves as reducing their consumption of wine. However statistical packages such as Mintel, the Drinks Pocket Book and Long Term Drink Trends show that the number of wine consumers is no longer rising but that the current number of consumers are consuming more heavily.

Many of the trade wine buyers had suggested that older consumers were likely to be drinkers of traditional Old World styles of wine because these were the only wines available to them in their youth and they had not had the travel opportunities that are common amongst the younger population. As a member of the oldest group identified by the trade wine buyers, the over forty fives, this is a very sweeping suggestion not backed up by the experience of myself nor the views of the consumer focus groups. It may be true that those who are in their late sixties and over who were already mature wine consumers when the New World styles of wine first became widely available within the UK still prefer the wine styles and consumption occasions with which they were familiarised. However wine consumption falls in this age group (Mintel, 2005) and becomes less significant to the market. The heaviest wine consumers are those aged thirty five to fifty four (ACNielsen, 2005; Mintel, 2005). If the older consumers in this age band started to drink wine between the ages of twenty to thirty then they would have started as the New World styles of wine, purchasing and consumption habits were being introduced via supermarkets to UK consumers. There is no reason to assume that they will automatically start to change the range of wines that they consume from New World to Old World simply because
they get older, despite the strong assumption by the trade wine buyers that involved consumers would naturally become ‘more sophisticated’.

The trade wine buyers disagreed with Hanni (2002) and Bruce-Gardyne (2006) and believed that all palates change from sweet to dry as we age therefore wine consumers’ tastes would automatically move from simple sweeter whites to complex drier reds. Murphy (2003), Charters (2004), Lyon (2004), Rand (2006) suggest instead that involved consumers change wine styles because they have become consciously aware of being ‘bored’ by mass produced, simplistic consistent New World styles of wine and begin to seek out different more sophisticated taste stimuli. This would confirm the work of Dodd (1997) and Goldsmith and d’Hauteville (1998) that heavier wine users are more likely to become experimenters and innovators of wine styles than low volume wine consumers. This work suggests that wine consumers may change the wines that they drink as they become more involved, from simple mass produced New World styles of wine to more complex Old World styles, not because this is an automatic natural progression, but because of identifiable physiological phenomena. Wine consumers may also change drinking habits, or public drinking habits at least, if some in their social group start experimenting and becoming more involved with wine (Christy and Norris, 1999) particularly if wine knowledge or interest is seen to be or becomes part of their identifying group culture, the development of the previously mentioned ‘boys club’ culture perhaps.

Many of the consumers talked about the synergy of food and wine and it is likely that some change in wine consumption habits is due to changes in lifestyle from single to family units. Since in-home entertainment including wine consumption is rising especially amongst family units with young children (Mintel 2005) and wine prices have fallen in real terms (NTC Publications Ltd, 2000) this is a low risk interest both socially and financially which can be
shared by all within the social group and which for some will develop into a high involvement passion.

It is therefore not age per se but familiarity with a simple taste stimulus which creates dissatisfaction which causes some wine consumers to move to a more conscious involvement with wine as they seek more individual wines which provide more satisfactory taste stimuli. This development can also be stimulated by some lifestyle changes and increased disposable income.

Low involvement consumers for whom price and alcohol may well be the main drivers to consume may remain low involvement because there is neither taste stimulus nor cultural reference to interest them in wine as an object rather than an alcoholic beverage. In fact the simple consistent taste range of most mass produced entry point wines, whilst it may encourage first time wine drinkers by making wine approachable, also has the disadvantage of confirming to the uninterested consumer that wine is not something to get excited by and talking about wine or paying a lot of money is sheer snobbery (MGC5: Beardsworth and Keil, 2000; Demossier, 2004). For these consumers involvement with wine is unlikely to increase either with age or familiarity; it might do so if the consumers lifestyle and social group participation changed (Warde and Tomlinson, 1995).

9.2.2. Gender

Wine is consumed by most adults, 62.1% of all men and 68.7% of all women (Key Note 2004, p. 60). But there is very little clarity about who actually buys it or makes the buying decision except amongst the mail order companies who confirmed that approximately 95% of all purchases were made by men. Within the multiple grocery chains, where over 84 % (Mintel, 2005) of off-trade wine is purchased some felt that women were the dominant purchasers, others
that it was the men who bought but both observations may have some truth in them. As Cockburn-Wootten (2002) and Mintel (2003) show women are still the most likely to fulfil the grocery shopping role in a multi-person household even if both adult partners work. It is likely that there are significant numbers of women buying wine in supermarket either as a conscious choice or as part of the supermarket shop. However some trade wine buyers had observed women ‘parking’ their husbands in the wine aisle whilst they get on with the rest of the shop.

The reason why women may have higher wine purchases on their store cards in supermarkets may be because many do place the wine in the supermarket trolley all of the time either as a planned or uninterested purchase. In other cases the male partner will have selected the wine and placed it in the trolley; the whole shop may then be paid for out of the housekeeping budget, which is most often held by the female partner.

The trade wine buyers identified bustling and browsing shoppers but did not comment on any specific gender based attributes. The consumer focus groups suggested that the bustling shopper may often be a women shopping for wine just as part of the household routine and since wine has become so common place within their social group, like Bourdieu she may not see wine purchased as part of grocery shopping as wine shopping. The trade wine buyers for the multiple chains said that they had run focus groups in which women shoppers had said that wine buying was a treat at the end of the grocery run and that most supermarket retails outlets were designed so that the alcohol aisles were at the end of the shop so that the reward factor and potentially increased sales from all shoppers could kick in. However apart from the female members of the expert consumer focus group all the other female consumer focus group members said that wine buying itself was of little or no interest to them; certainly not the self indulgent activity described by the experts and some male members of the focus groups. Quester and Smart (1996), Vinexpo (2001), Thomas and Pickering (2003a), Williams (2003) and Hoffman (2004) all show that men and women buy wine differently. In supermarkets it may be because of the positioning of the wine aisle and because of the fun socialising image that the consumers
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considered to be an important attribute of wine, that when the wine aisles are reached the end of the shop and the start of another more sociable activity is in sight. The purchaser perks up, happily buys through the aisle, corresponding to the trade wine buyers’ focus group findings but without the full concentration of a browsing shop, in much that same way as the consumers were all interested in the Good Drink radio programme but didn’t engage deeply enough for there to be any follow up.

Wine Intelligence (2002) showed that men seemed to have more confidence in buying wine than women and this was confirmed by the consumer focus groups where there was a prevalent and constant view, except amongst the expert group, that wine buying was a ‘male’ activity whilst wine bought as part of the supermarket run was not really wine buying at all. This behaviour is confirmed by Charters and Pettigrew (2002), Charters (2004) and Beverland (2004) who show that there is a perception that two types of wine exist for most people, beverage wines and special wines for occasions, and that they are bought differently. Beverage wines tend to be bought thoughtlessly probably as part of the grocery shop, so more often by women, whilst special wines will often be planned purchases by men, particularly those in partnerships. The results from the consumer focus groups suggest that many female consumer believes that their male partners will actively buy wines with their tastes in mind. Special purchases would include wine as a gift, for a dinner party, as a bulk purchase or from a winery. Responses from the consumer focus groups would suggest that both men and women are compliant in this gender role behaviour except where the woman is a heavily involved expert.

This behaviour, also identified by Halstead (2002) and WJ1, was reflected in on-trade situations when many of the female consumer group participants discussed various strategies which they used either to abdicate all responsibility for buying wine or to pass some of the responsibility to others. The unit managers had noted that all female groups usually bought house wine or familiar brands.
The younger consumer focus groups had suggested that the drinking of wine by men in some non-food environments could give the wrong social image; the unit managers of on-trade premises commented that when girls were all dressed up they could not sit and drink beer because that would ruin their image. Whilst the older consumers, most of whom were in partnerships, were far less affected by these gender role stereotypes this would suggest that public wine consumption is influenced by gender and by gender based image perceptions which are venue and occasion dependant.

9.2.3. Real Risk versus Reified Risk

Much of the current thought about UK wine consumers is based upon the work of Mitchel and Greatorex (1989) and Spawton (1991). They believed, along with the current trade wine buyers, wine producers, Egan and Bell (2002) and Demossier (2004) et al that for most consumers buying wine was a very stressful activity which caused much social and financial anxiety and had to be managed. The data collected from the wine journalists and the consumer focus groups challenges this received wisdom suggesting that whilst some risk is perceived it is only in very specific situations and most wine purchasing and consuming has no risk at all attached to it; so much so that in some circumstances some consumers did not even perceive that they were buying wine when they were.

9.2.3.1. Financial Risk

A question raised at the start of the research and mentioned earlier in this chapter was, “is there no wine between beverage and fine wines?” as identified by Bourdieu, Spawton (1991) and Beverland (2004). The reason the question was raised is because only a few researchers such as Charters and Pettigrew (2002) and Charters (2004) have discussed the different perceptions of quality which different cultural groups use to understand and consume across the whole range of wine. If there was a gradation of perceptions of different types of wine that might explain
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why consumers found little stress in buying wine, they would just operate in that range which suited that specific occasion, an activity observed in particular groups of wine consumers by both Bruwer et al (2002) and Olsen et al (2003).

This thesis suggests that there is no middle ground to identify because the price differential between beverage and special wine is not great for the majority of purchasers; over 58% of all off-trade wine spend in 2004 was under £4.99 and another 24% of spend was on special occasion purchases at between £5.99 and £8.99 (Mintel, 2005). There are thousands of different wines available within the UK priced at under £8.99 therefore consumers can choose to raise or lower their buying price with ease. Since less than 5% of wine is purchased for over £11.00 (Mintel, 2005) wines over £11 in the UK off-trade must be considered to be fine wines, but for many, as the consumer groups discussed, this price would be too much to pay for a single bottle of wine for any reason, except possibly for champagne for a significant celebration. For a small section of the wine consuming population these £11 plus wines would be the ones that they would aspire to.

As MGC5 commented, if £2.99 is the normal cost price of a bottle of wine then the £4 - £5 bottle would be a reasonable price for this type of consumer for a special bottle; £4 - £5 does not incur a significant financial risk for a gift. Equally for those who perceive £4 - £5 as their normal purchase price per bottle under £10 is unlikely to be seen as a significant financial risk. Therefore wine buying across the UK does not need to incur financial risk. This agrees with Mintel (2002), Halstead (2002) and The Vinexpo Studies (2003) that most consumers do not perceive financial risk when purchasing wine in the off-trade, unless as Christy and Norris (1999) and Ravenscroft and Van Westering (2000) show, they are actually seeking that risk as part of their experimentation with wine or they are buying wine as a potential investment.
Price was perceived as a significant factor in on-trade purchase particularly where the consumers perceived that the price quality relationship was wrong. The consumers, agreeing with the wine producers rather than the trade wine buyers, were acutely aware of the price differentials between on-trade and off-trade prices, even though many wines are only available in one or other sector. Like the wine producers they accepted that you would have to pay more to consume in the on-trade than in the off-trade as with food and other beverages because you are also paying for the environment. There was a very strong belief that in most on-trade establishments the mark up for wine was much too high and it was not possible to make a fair price quality purchase. The consumers commented that their average spend in restaurants was £15 - £20, the national average, and that they would only trade up where they had established to their own satisfaction that the mark up was fair. This happened mainly in independent restaurants where a relationship developed with the staff or where the more knowledgeable consumers were able to calculate for themselves if the mark up was reasonable. Perceived over pricing did not stop wine purchasing in food related situations, although it could in non-food environments, but it did reduce spend.

Conversely the focus group participants also identified a group of consumers for whom excessive mark up enabled a public conspicuous consumption occasion where those involved could show off their economical and cultural capital, demonstrating extreme elitist behaviour.

9.2.3.2. Social Risk

The consumers, agreeing with Thompson and Vourachis (1995) and Bruwer et al (2002), tended not to talk about wine as a whole being expensive or cheap because the range of wines available at a range of prices means that it is always affordable. Far more significant to the consumers was the social risk that any form of public consumption of wine could incur. The consumers believed that any wine they bought or served at any particular event would and or should reflect
the image that they wanted to portray in that environment. Awareness of image did not always mean trading up since trading up at a barbeque could be considered to be rather snobby but it did in a majority of occasions. It was this perception of public wine culture rather than simply considering price as a quality indicator that caused stress in a variety of social situations.

Several highly involved consumers who had a high awareness of image had developed a variety of strategies to enable them to consume wines that they liked or wanted to try without appearing to be elitist, such as hiding wine and or making it available only to a discreet few. Those with less involvement, mainly the youngest focus group and a significant number of the female focus group participants, had developed strategies for abdicating some or all of the responsibility for the wine purchase and so could concentrate on the fun of wine consumption. If they were not responsible for the purchase they could not be responsible if there was a problem with the perception or taste of the wine.

Included in self-image was the physical appearance of the bottle and its label. It had to look like something that the giver had thought about and that the recipient, no matter when they got to look at the bottle, would react positively towards. There was however very little consensus as to what makes a good bottle presentation, not just in the primary data collection, but also in the secondary research, (Charters et al, 1999: Lesschaeve, 2002: Thomas and Pickering, 2003b). The trade wine buyers and wine producers felt that a ‘good’ label would attract the consumer and encourage repeat purchases if the wine was liked but most consumers, as Chaney (2000) suggests, had trouble remembering a previous bottle image except for a few national brands such the yellow label on Wolf Blass. The consumers also felt that a wine bottle that looked right for one occasion might look wrong for another.

In informal home dining situations the image of the wine bottle and social risk were considered almost irrelevant. However all of the consumers, as Lyon (2004) also found, believed that they
spent above the national average for their wine for informal home consumption and very few admitted to buying on promotion. It may be that there is some discordance here between actual and self perceived behaviour.

9.2.3.3. Venue Risk

During formal public dining occasions there was much more ritual acknowledged, agreeing with trade wine buyer unit managers, Bourdieu, Visser (1991), Hall et al (2001) and Demossier (2004) that we have certain behaviours which must be observed to demonstrate inclusiveness within the culture of the occasion. The ability to comply with these rituals reduces stress and increase cultural capital, lack of knowledge or inclusion significantly increases stress.

These behaviours include activities such as champagne to acknowledge an achievement or celebration and more subtly the ability to buy wines to suit the tastes of others at the table. This was taken by the trade wine buyers to be one reason for the continuing popularity of traditional old world wines in formal restaurant situations. The status of these wines has been publicly acknowledged, their ability to match with certain foods has been written about, so a wine can be chosen even if the purchaser has little personal knowledge of that actual wine; they can still order and become responsible for a socially ‘correct’ match. Whilst women make up about half of the work force men predominate in managerial and career jobs. Business is often conducted via a food and drink occasion and Hall et al (2001) showed how wine choice becomes more traditional upon business occasion meals. This may be why men tend to demonstrate more confidence in the public purchase of wine (Vinexpo, 2001; Wine Intelligence, 2002: Williams, 2003) and provides another rationale for the “boys club” wine consumer. The adoption of work norms and transfer of the business culture may include the need to be able to host a business related meal with confidence, this would encourage the reification of rituals observed on previous occasions by senior colleagues. Only the highly involved wine consumers felt
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confident enough to move away from tradition in formal dining situations and order as they chose, unconsciously creating another set of rules (Savage et al, 1992) for others less embedded in wine culture to aspire to understand and emulate.

As Hall et al (2001) show not all public dining occasion are formal ritualised occasions. A meal in the pub or at a local restaurant with friends is much more informal than a business or a formal social event such as a wedding. It is also likely that the cost will be perceived as low and the venue as local and familiar. Since those socialising informally in this way probably have a similar financial and cultural homogeneity risk associated with this type of informal public wine consumption was perceived as minimal.

Unlike the ‘local’ the non-food pub and club environment was agreed by all to be so potentially risky that they might not buy wine at all. This had both to do with the alcohol level, the physical bottle and perceived quality of the wine. In a non-food pub or club, either independent or branded chain it was considered safest to buy a known brand of wine, although there was an acceptance that wine by the glass could still be bad because it was likely to have been badly kept. The rationale for this perception differed between the stakeholder groups. The trade wine buyers and wine producers felt that the brand provided a known standard, a known taste for the consumer and so reassurance. The consumers agreed with this but added an extra dimension: since they believed that the wine was likely to be low quality and over priced if they saw something that they had tried in the off-trade they would know if they were going to get something they liked and the value for money ratio. Given the very strong perception that wines in non-food on-trade venues carried a significant risk of being unsatisfactory in some way, the consumers’ ability to recognise and challenge an off wine would be significantly raised if they drank something that they were familiar with. This is perhaps what was providing the reassurance, not necessarily that the wine chosen was the brand or wine of choice, but in an
environment which was perceived as public and expensive prior knowledge gave control of the situation back to the consumer.

This general perception that wine would be low quality and off in non-food environments also meant that if the wine was of poor quality or disliked the consumer could blame the venue and abdicate responsibility for their decision making. As there is agreement that wine quality overall has improved significantly in the UK either the staff in non-food environments persistently and consistently store wine incorrectly or part of the image of low quality wines in these environments is due to consumer reification; however the perception of low quality is useful to low involvement consumer because it lowers the responsibility for poor choice.

9.3. The UK Wine Consumer Identified

From the data generated by this thesis it is possible to identify a detailed and sophisticated UK wine drinking culture and UK wine consumer. This started with the trade wine buyers identifying several different types of UK wine consumer, see table 5.1, based on age and lifestyle and moderated by whether the purchase was for on or off-trade consumption. The wine producers contributed their, much simpler, view of the consumer; the basic wine drinkers for whom wine was not the primary alcoholic drink; the next level who had moderate involvement, enough to know different grape varieties, brands or countries and finally the heavily involved consumer. The wine producers commented that the basic wine drinkers just drank wine as part of their general alcohol consumption profile, the moderately involved liked wine but wanted it to be easy and fun and it was only the highly involved who dedicated any significant time and effort to sourcing wines. The wine journalists added their perceptions to the mass of data, identifying high and low involvement consumers and further subsections within those groups, see figure 7.1. Included in the low involvement groups were the uninterested and the everyday consumer; in the high involvement group the hobbyists, capital seekers and specialist groups.
The literature reviews had suggested that there several different types of consumers again using terms such as high and low involvement and supported the trade wine buyers belief that consumers change their behaviour according to the environment and occasion.

There is consensus and difference arising from this. Only the trade wine buyers thought that there were significant age or lifestyle groups but all participants acknowledged the idea of low to high involvement consumers. The consumers themselves did not identify age and lifestyle differences except in younger consumers, FG1, who had not yet ‘grown into wine’; FG2, 25 – 34 were showing similar buying and consuming habits as the older groups, FG3, 4 and 5, the main difference was that they showed more stress in formal on-trade situations and abdicated from buying but not consuming more often. What the consumers did identify was that there are low involvement, moderate involvement and high involvement consumers but that there are subsections within these groups and that all behaviour can be moderated by the situation and occasion, agreeing here with the trade wine buyers and Lockshin and Kahrmanis (1998), Bruwer et al (2002), Olsen et al (2003) and Johnson and Bruwer (2004). The consumers also demonstrated very strong gender bias in purchasing some of which had been suggested by the trade wine buyers, Savage et al (2001), Hoffman (2004) and Mitchell and Hall (2004). All groups except the consumers discussed the existence of those who buy solely on price promotion, the price promotion junkies.

Table 9.1 summarises all these different view points and identifies a sophisticated UK wine consumer profile unlike the simple mass consumption versus elitist profiles previous studies have suggested; wine, whilst retaining some aspirational and some elitist qualities, has become democratised for most of us. In direct contrast to much of the received wisdom from both academics (Mitchell and Greatorex, 1989: Spawton, 1991: Thompson and Vourvachis, 1995: Lockshin et al, 2001: Demossier, 2004) and the trade, specifically most trade wine buyers and wine producer current UK wine consumers may not always be interested in wine but none are
<table>
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<tr>
<th></th>
<th>Trade Wine Buyers</th>
<th>Wine Producers</th>
<th>Wine Journalists</th>
<th>Consumers</th>
<th>A UK Wine Consumer Profile</th>
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<td><strong>Low Involvement</strong></td>
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<td>Age</td>
<td>18 to mid 20’s</td>
<td>Disinterested</td>
<td>Basic no fuss</td>
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<td>Price Promotion Junkie</td>
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<td>Price conscious and nervous</td>
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<td>Bustling multi product shopping</td>
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<td><strong>Medium Involvement</strong></td>
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<td>Consumers</td>
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<td>Age</td>
<td>Mid 20 - mid 30</td>
<td>Novices</td>
<td>Relaxed, social</td>
<td>Not interested</td>
<td>Fairly confident Low stress</td>
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<td>Experimenters</td>
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<td>Grocery Shopping purchasing</td>
<td>High image awareness</td>
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<td>Mid 30 - mid 40</td>
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<td>Young Adults</td>
<td>Sophisticated informal social usage</td>
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<td>Wine Buffs</td>
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<td>Aspirational Fine Wine</td>
<td>Hobbyists</td>
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<td>Capital Seekers</td>
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<td>Specialist Groups</td>
<td>Either on personal cultural quest or</td>
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<td>‘Boys Clubs’</td>
<td>on a public capital quest</td>
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<td><strong>High Involvement</strong></td>
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<td>Specialist Groups</td>
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<td><strong>Suggested movement</strong></td>
<td>Increased</td>
<td>Some trickle up from medium to high involvement groups. No movement from low involvement consumers</td>
<td>Some trickle up from lower groups. While many remain in original category most are affected by the occasion.</td>
<td>Not so much a progression but all high involvement consumers also having everyday consumption habits, situation dependent.</td>
<td>Movement across the range apart from the not interested and wine bores. Position age, situation, occasion and gender dependant.</td>
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<td><strong>across involvement</strong></td>
<td>involvement as consumer gets older.</td>
<td>Some trickle up from medium to high involvement groups. No movement from low involvement consumers</td>
<td>Some move up from lower groups, but many remain in original consuming group.</td>
<td>Not so much a progression but all high involvement consumers also having everyday consumption habits, situation dependent.</td>
<td>Blurred edges and significant movement between involvement levels. Cultural, situation, occasion and gender dependant.</td>
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Table 9.1 The Identification of a UK Wine Consumers Profile
afraid of it, happily consuming 26.20 litres per adult (over fifteen) per annum (ACNielsen 2005, p. 26) and rising.

The final UK wine consumer profile suggests that most young adults are not interested in wine but many are likely to become regular wine users as they mature, because of the phenomena previously identified, if wine has been included by their parents as part of their cultural habitus; they are part of the not interested low involvement group during this period of their lives. The not interested group also includes those who are not interested in wine *per se*, for whom it is just an alcoholic beverage not their favourite one. This group may never change their taste for wine but some may if their social situation requires it also be part of the high involvement ‘boys club’, this behaviour is also suggested by Demossier (2004) and reflects the cultural pressure that Bourdieu discusses. The not interested group also includes the price promotion junkies and the bustling multi-purpose shopper who can be the same person; the female grocery shopper who is ‘not’ buying wine merely rushing around the store for the household shop. It is very likely that this shopper will use promotions, (Balasubramanyam and Salisu, 1994: Aufenast, 2002: NWW4: MGC3) to speed up the purchase decision for wine and other FMCGs and so will be behaving like the price promotion junkie. In other situations however such as buying wine as a gift for any type of occasion many of these non interested consumers will consciously moderate their behaviour and seek out specialist advice becoming involved and image conscious in that wine purchase and perhaps consumption situation.

Some of the non interested consumers will always remain uninterested and therefore in the off-trade will always buy wine on the basis of the latest promotion and in the on-trade buy house wine, never moving out of the low involvement category. The non interested consumers will not, despite what the trade wine buyers and Mitchell and Greatorex (1989) suggested, notice any stress when buying or consuming wine because they have plenty of cues including family, friends, promotions and familiar brands to help them buy wine (The Vinexpo Studies, 2003) and
since wine as an object is not significant to them they will not worry about its consumption. Stress is only identified where they feel that they have to buy wine in some on-trade situations, in this case they will generally stick with house wine or a familiar brand or name they recognise from the off-trade. They will justify this behaviour as MGC3 and Demoissier (2004) suggested by commenting upon the price differentials between the supermarkets and the on-trade, thus retaining and reinforcing their own social image within their cultural groups.

Consumers who have a moderate involvement will have more interest in wine and more confidence in buying it. They will use wine extensively in social situations utilising the sharing aspect of the 75cl bottle. As previously mentioned they may buy as a low involvement consumer in certain situations but at other times particularly where wine is to be consumed publicly they will be very conscious of the image that their purchase and or consumption presents. These consumers trade up and down in their purchasing decisions being confident enough to live with the result of their decision (Bruwer et al, 2002: Olsen et al, 2003). These are the consumers who enjoy wine but don’t want to work at it reflecting WP2’s view of wine consumers. Whilst generally confident they do sometimes feel stress in buying wine, when buying for particular public consumption occasions for example and therefore have developed the buying strategies discussed in chapter eight; this behaviour was particularly noticeable in FG2. In addition for formal occasions such buying wine in a restaurant for a business occasion they would behave as Hall et al (2001) and the trade wine buyers described by choosing a safe traditional known, but non branded, wine. The key words for these moderately involved consumers are relaxing, enjoying, fun. This reflects the fact that as we have grown up as a generation of wine consumers, absorbing the symbolic and cultural capital of wine usage, wine consumption is now perceived as a normal cultural activity within many social groups. Most of the time it is not the aspirational elitist activity written about in earlier literature and reiterated by the current trade wine buyers who learnt about the difficulty of selling wine from their predecessors in a then newly developing market.
Table 9.1 also identified groups of consumers with a very high involvement with wine who may be interacting with wine in an elitist fashion. These high involvement consumers may be the wine buffs described by the trade wine buyers and the wine producers but they are not a homogenous group. The wine journalists and consumers each suggested three subgroups suggesting that the high involvement group may be a larger percentage than the 5% to 10% of the adult population often speculated; reflection upon the make up of the final pilot focus group and the actual focus groups would tend to support this idea. There were no high involvement consumers in FG1 or FG2 and by definition all members of FG6 were high involvement, but seven out of the twenty four participants, 29%, in FG3, 4 and 5 had characteristics of the high involvement group; characteristics such as having a wine cellar, being able to rationalise and be comfortable with high on-trade spending, being a member of a ‘boys club’, owning wine books, attending wine tastings and or visiting vineyards. This could have arisen because all of the consumer focus group people were asked because they consumed wine; however the participants in the final pilot consumer group were chosen by their link person because they were members of her jewellery making group not because they necessarily drank wine. After the pilot focus group two of the seven joined CWTC because they decided that they wanted to know more about wine reinforcing the suggestion that wine may be evolving into a mainstream rather than a purely elitist interest or hobby.

The terms wine expert and wine buff were used frequently and synonymously in the interviews for this thesis and both appear in the literature. A precise definition of these terms has always been unclear; an expert may have connotations of some sort of professional authority and a buff usually has connotations of an enthusiastic devotee, in the case of wine both also usually have elitist socially exclusive connotations. Within the highly involved consumer category both the wine journalists and the consumers identified hobbyists, who are probably the most closely related to the traditional term wine buffs used by the trade wine buyers or the aspirational fine wine drinkers noted by the wine producers; those who enjoy wine and have a deep personal
interest in actively learning more about it (Christy and Norris 1999). Whilst they are adding to their symbolic and cultural capital they would not perceive their behaviour as being any more exclusive than joining a jewellery making or other hobby group. However the wine journalists and consumers also identified other high involvement groups as well. The wine journalists talked about capital seekers, those who sought out wine and used it very publicly; these may well be the wine bores identified by the consumers. Here wine knowledge is sought not for the sake of wine itself but because of past reification and their perceived elitist exclusive image of fine wine. These consumers seek out fine wines in the ways described by Bourdieu; they seek them, talk about them, buy and maybe consume them publicly to demonstrate their own cultural and economic capital as part of their effort to demonstrate inclusiveness in exclusive social groups.

The consumers then went on to identify another high involvement group, membership of which displays characteristics of both the hobbyist and wine bore groups. The ‘boys’ club’ members range from low to high involvement wine consumers as far as consumption preference is concerned, The one feature they have in common is all being members of a social group in which knowledge of wine, use of wine in public consumption situations and purchasing of wine is a norm: they don’t have to either like it or drink it in private although many may do both. As Williams suggests food and drink have physiological benefits but are also ways of:

expressing culture ... through socialising, participating in ritual, expressing symbolism.
(Williams 2002, p. 96)

The other feature of this group is that this wine role is commonly taken on by the male half of a partnership with the female partners’ active connivance to fulfil a social norm within their peer group.

The third group which the wine journalists identified were the specialist groups, potentially including trade wine buyers themselves. All of those interviewed for this thesis were wine
consumers. Therefore all of the interviewees in all four of the studies will be wine consumers as well as some being people who work in the wine trade. Specialist groups may be large or small and have some or no members who work in the wine trade, however have one common feature, that they are not necessarily sourcing and purchasing wine for their own personal preference. Groups can include those who run wine tasting classes in Adult Education Centres, wine tasting groups such as CWTC, those who may be connected to the Slow Food Movement and like to match food and wine for events or tourism companies seeking to exploit this niche market.

Those who have written about wine consumers, and particularly UK wine consumers, have only described those involved in fine or aspirational wines and mass consumption. The interviewees in this study have identified that a significant part of the UK wine consuming population are moderately involved wine consumers who, most of the time, see wine as an inclusive, relaxed way of enjoying their social life. Since wine is for most of the present generation, in its mass consumption guise, an everyday beverage it is likely that over the past generation familiarity with wine, its availability and quality have enabled evolution of the moderately involved consumers for whom wine has become an accepted and affordable addition to their cultural identity. A defining characteristic of the moderately involved consumer is the enjoyment of good wine along with good company, they are happy to learn about more wine but it must be fun and have no more exclusive a perception than any of their other cultural norms. Some wine will always remain elitist because of rarity, quality, fashion and so price. These wines will be treated by their producers as luxury products (Beverland, 2004) and since wine will never be an essential food item it is likely that wine will retain an elitist image along with its more recently developed democratic profile; social functional consumption alongside elitist private or conspicuous public consumption.
9.4. External Factors Moderating UK Wine Consumer Behaviour

Although it is possible to identify various types of UK wine consumer, this thesis has also identified external factors which the wine trade uses overtly or covertly to influence consumer behaviour. Paradoxically several of these business activities simultaneously stimulate interest in some types of wine consumer whilst repelling others. These activities are discussed in the next section.

9.4.1. Media

Wine journalists were considered to be of significance by the trade wine buyers but no other group including the wine journalists themselves saw them as having an overall significant influence on UK wine consumer behaviour. Halstead (2002) and Mintel (2003) both showed that television is the most significant type of media but although the consumer groups recalled some television coverage generally the recall was not positive. Wine journalists do not generally appear on mainstream television.

It is likely that the wine journalists view of themselves as only being of significant direct influence to heavily involved consumers, see figure 7.1, is accurate, along with their observations about the cultural rationale of editors for the inclusion of wine in the lifestyle sections of broadsheets. Certainly those focus group consumer members who read the lifestyle supplements did not follow up on the wines they read about, either because they felt that it was not available locally or that the activity of following up on an interesting wine would be too much like hard work.

In only one situation was there comprehensive agreement that wine journalists were significant influencers and that was as providers of point of sales information and or in the awarding of medals at wine competitions. Most consumers could name very few wine journalists but all used
point of sale recommendations (Mintel, 2001: Wine Intelligence, 2002) and wine competition medals as positive cues to buy. As Peattie (1995), Orth and Kraska (2001) and Lockshin (2004a) show competition winning wines promote positive perceptions amongst wine buying consumers; it is less obvious why point of sales information by an unknown writer would be of more significance that the information written on the back label of a wine bottle. There was some suggestion that the point of sales data was perceived by many consumers as being independent and the words on the label as being written with prejudice by the wine producing company. Given the reification noted in the wine trade and the problems associated with the precise connotations of a single word or sign as discussed in chapter three, the wine journalists, not shopping list writers, may have a better understanding of key trigger words for the UK public than the wine producer living in another culture with different references. As Brochet and Dubourdieu (2001), Lesschaeve (2002), Gluck (2003) and Goode (2005) discuss there are great subjective differences when translating tasting into written description further compounded by the use of words on labels which are designed to attract marketers (Chaney, 2000b: Murphy, 2003) rather than provide literal descriptions for consumers, as some consumers are aware. Perhaps for these reasons the language which the wine journalists use resonates more accurately with the consumer even if the name endorsing the quote means little: the newspaper or magazine title, if included, may have some effect.

9.4.2. Brands

The notion of a brand in wine terms is complex partly because of the use of economies of scope to deliberately proliferate the number of brand names but also because of the common usage of grape varieties and countries as synonyms for brands by all involved with wine.

In the on-trade the public dining experience has been shown to be a stressful environment, although this stress can be reduced by familiarity with the dining out experience per se and with
familiarity with the venue. Brands can provide the reassurance of a known, product, price and quality level; one reason for eating at MacDonalds, Pizza Hut or any other chain is that the consumer knows before they arrive what they will be able to eat. For many this is an incentive to choose that specific restaurant. The use of branded wines in this environment complements the reassurance of prior knowledge that the consumer using this type of restaurant wants and in non-food environments provides reassurance as to the taste and quality of the product. If John Smith’s Bitter, Fosters or Carling can be sold in pubs throughout the UK as well as in the off-trade there is no logical reason for branded wines not to be sold alongside them as Stowells has been for many years. It is only the big brands who have the ability to produce that consistency and volume which any national chain requires to present a unified image and product.

However when the consumer is seeking a food and wine experience in the on-trade that is different and that they cannot replicate at home then a mass produced branded product would not suit their expectations; hence the suggestion that nationally known wine brands work well in on-trade branded environments but not in independent, individualistic ones. In this type of environment, reassurance is provided by the use of familiar and traditional generic terms such as Chablis, Bordeaux and Chianti, or the use of familiar grape varieties such as Chardonnay and Pinot Noir; use of these terms assumes familiarity with them which does have elitist connotations. Many consumers use these generic terms and grape varieties as synonyms for brands and are far more familiar with them than actual brand names.

The wine trade suggested that their brand names provided reassurance for the novice, low involvement and bustling consumers in the off-trade. However most consumers are not brand loyal (Chaney, 2002: The Vinexpo Studies, 2003) and there was a belief by the wine journalists, supported by Lockshin (2004a), that buying from these large companies who could tailor make any wine to fit any range was simply lazy buying on the part of the large off-licence chains. What large producing companies can do is have a large enough range and promotional budget to
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meet the requirements of the multiple grocery chains and secure a listing. Via economies of scope they can produce enough brands so that price promotions can be undertaken in a way that small individual producers cannot and they can quickly develop new brands if required, (Hibberd, 2003).

However the very size and consistency of their production causes boredom with the product to set in, as Gluck (2001), Murphy (2003), The Vinexpo Studies, (2003), Lyon (2005) and the consumer focus groups showed. This causes some to lose interest in wine and others to develop a more experimental view of wine which through experimentation is likely to cause them to avoid mass production brands in the future. Large companies seek to avoid this customer loss via their proliferation of brands and brand ladders aimed at assisting the consumer in their development of wine knowledge whilst retaining their purchases within the company. The consumer focus group members were not aware of these brand ladders, so loyalty to the company tended to be accidental rather than planned for these new experimenters. If these moderately involved consumers became heavily involved they were most likely to shy still further away from international wine producing companies seeking out smaller niche producers who they perceived would be producing authentic terroir based wines. This would involve moving away from buying primarily in multiple grocery chains and into specialist off licences, mail order etc.

When a brand becomes too big because of the perception of wine as a natural artisanal product, an image cultivated by the wine trade, it ceases to be of much interest to actively involved wine consumers. Many companies who produce mass production wine brands also produce an iconic brand/s under other labels or company names, (Penfolds and Grange) and as most consumers in the UK are spending under £8.99 these wines may be something they might aspire to but not a wine they would seek to buy regularly; the aspirational element is part of their attraction and
purpose. For the uninterested wine consumer, a large section of the UK wine buying public, the cocacola-lisation of wine is a positive incentive to buy.

9.4.3. Promotions

There was general agreement that all consumers are influenced by promotions and that many buy on promotion, both multi buy and price reduction. Promotion per se did not have negative connotations for the focus group consumers; whilst they didn’t trust the quality of wine when prices were seen as too low they were happy to take advantage of promotions which fitted their normal wine buying habits. Curiously this rarely seemed to include buying under £4.00 even on promotion, a point further discussed in the next section.

On-trade promotions were mentioned by the trade wine buyers, such as buy two glasses and get the rest of the bottle ‘free’. These promotions, which are mainly available in pub and bar chains, had not registered with the members of the consumer focus groups. It may be that because they saw wine as likely to be of low quality and expensive they bought very little wine in a non food environment. It could be for some in the focus groups that these promotions are usually available in national chains which have a quite young customer profile and so they don’t use these venues, but neither FG1 nor FG2 mentioned them either. I have been in a pub where upon buying two glasses the bar staff asked if I wanted the rest of the bottle. I was put into a bit of a quandary, had I paid so much that I could have the extra glass and the venue still make a profit in which case I should jump at the offer or since I didn’t think that I would like the wine much, it was the best of the limited range available, would I actually want extra wine and so should I refuse? Many customers would see this promotion as an excellent idea particularly those with low involvement or low disposable income, often younger age groups. However other consumers, such as drivers and those like myself, may feel intimidated by being overwhelmed by more uninteresting wine than it had been intended to consume thus perpetuating the idea
amongst moderately to high involvement consumers that non-food environments are not suitable venues to consume wine.

Whilst it may feel like it in some on-trade venues, I have never come across the other on-trade activity recommended by one wine producer, that the whole cost of the bottle of wine should be covered by the first glass sold. It may be that whilst this is an accepted pricing policy in the USA it would not be accepted within the highly price sensitive UK on-trade market.

9.4.4. Price

The average price of a bottle of wine in the UK off-trade in the UK is below £4 but none of the consumer focus group members felt that they bought at below £4 -£5 unless it was a wine that they were familiar with. They said that they bought £6 - £7 wines bought down to £4 - £5. Lyon (2004) also found that consumers said that they usually bought within the £4 - £5 bracket. As discussed in chapter eight, it could be that since all the focus groups were conducted in the southern half of the UK and more price discounting goes on in the northern half that these consumers were correct in their assumption about what they paid. However, many of these consumers, particularly women doing a family grocery shop also denied buying wine. It may be that they believe that £4-£5 is the ‘correct’ price of a bottle of wine and therefore genuinely assumed that they paid that amount, whether or not they bought the wine on promotion and if their partner put the wine in the shopping trolley they may have had to guess at the price in the focus group discussion. It may also be that they do buy on promotion but as Patton (2002) suggests were reluctant to admit to this behaviour in a public situation in front of their friends, even though the use of friends in a focus group tends to create a natural safe environment (Barbour and Schoskak, 2005). I, as focus group moderator, had deliberately bought on a £3.00 promotion and discussed this activity specifically to reassure those who bought this way but very few participants acknowledged buying in this range.
The consumers were much more accurate about their normal spend in the on-trade £15 - £20; this is the actual average. The consumers may have been much more aware of price in the on-trade because they were so much more price sensitive as they perceived buying wine in the on-trade as expensive. This is likely to be because very few study their supermarket bill in detail before paying but most people in a restaurant, especially if they think that the meal is expensive, will check it over before payment and will often have checked the price before ordering the wine.

It may be that whilst some consumers actually abdicate responsibility for buying wine in the on-trade, others because of the generally perceived high mark ups are happy to push the responsibility for buying wine at the cheap end of the list firmly back onto the on-trade and admit to buying at the lowest end of the price range because it seems sensible to them. Therefore the consumers are aware of and happy to discuss the actual price that they have paid either in horror or satisfaction in the on-trade, but since they have full responsibility for off-trade purchases they have an awareness that the price they pay should reflect the image that they present about themselves to others. It was the women who were generally less confident purchasers abdicating responsibility for wine purchasing to their partners and women as Warde and Tomlinson (1995) show who most often try to promote the social cultures of their male partners, i.e. that they are involved in this male activity of wine buying.

9.4.5. Staff

There was complete agreement from all of the interviewees and many academics (Lockshin and Kahrimanis, 1998: Hall et al, 2001: Johnson and Bruwer, 2004) that knowledgeable and helpful staff encouraged consumers of all types, except the uninterested, to trade up in all purchasing environments; equally that staff perceived as lacking in knowledge would not be consulted. The consumer groups made the assumption that young staff would be inexperienced but as MIROI
showed this was not always the correct assumption. It was a realistic assumption however since in many low skilled on-trade environments staff churn is condoned (Lashley et al, 2002). Whilst the wine wholesalers had increased the training of staff in retail outlets, the age of the staff in the on-trade often precluded any real interest in wine and staff churn simply meant that for training to have had any effect it would have had to have been continuous. Only in up-market restaurants were staff perceived to have knowledge and even then trust had to be built up via a series of positive experiences.

It was felt by all of those trade wine buyers working in the off-trade that only the specialist off-licences, in whatever format, had the ability to ensure that trained staff were always available on the ‘shop floor’ and the consumers agreed that these were the places that they would go to for special wines for special occasions. The consumers also mentioned specialist off-licences that they used as being local and familiar. This might indicate that when specialist wines are being sourced the consumer does not want to take the risk of an unknown supplier, they prefer to go to someone with whom they have built up a personal rapport or via personal recommendation to reduce risk.

Familiarity, trust and perceived gravitas were the key words used if the consumers were to engage with staff in either on or off-trade situations. If these were not available then the consumers would simply revert to the risk avoidance buying strategies identified in chapter eight.

**9.5. Summary**

During this thesis a theory has been developed which identifies several different types of UK wine consumer and suggests how they behave in a variety of situations with much more clarity and sophistication than has been done before. It has also been possible to suggest various
cultural and market based activities which moderate the wine consumers’ behaviour in various specific circumstances. This thesis has also shown that whilst the UK wine trade can make accurate as well as inaccurate observations about what their consumers do, they are more likely to be wrong about the consumers motivation for an accurately observed behaviour than right. Since this thesis is based upon grounded research it has not been possible nor is it the purpose of this thesis to test the theory constructed. Instead various themes have been identified which should form the basis of further research which will test and develop this work, discussed in chapter ten.
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Reflections upon the Thesis Processes and Recommendations for Further Research

10.1. Introduction

The aim of this thesis was to establish who the UK wine consumer is and how and why they behave in relation to the use of wine because as figure 1.1 and table 1.1 show the UK is currently the largest wine importing market in the world and our consumption is predicted to continue rising. The purpose of this chapter is to review and reflect upon the processes undergone and knowledge constructed during this research; to summarise the contribution that this thesis has made to both the business and academic community; to discuss the limitations of the research and to make recommendations for further research.

10.2. Review of and Reflection upon the Research Process

As identified in the literature review there is, or has been up until now, very little written about the UK wine consumer even though they are a very significant section of the world market. This lack of data was identified during the proposal construction period, see chapter one, and therefore it was realised very early on that one of the methodologies that would need to be utilised was grounded theory because of its ability to develop a stockpile of knowledge from a limited base upon which theory can be constructed (de Certeau 1986: Strauss and Corbin, 1994: Locke, 2001). Since a grounded theory approach needed to be utilised the postmodern philosophical position that this thesis took was a constructionist epistemology and critical realist stance. This enabled the use of a multi-strategy approach in which several ethnographic methodologies, including grounded theory, could be used producing a much richer set of data collection than a single method would have done (Henn et al, 2006). The use of a variety of methodologies and methods including autoethnography, interviews, focus groups and
participant observation enabled a flexible inductive approach reacting critically to the data construed rather than imposing pre-conceived ideas and values upon the UK wine consumer as it appears that much of the wine trade and current academic theory has been doing.

However an iterative, inductive process such as this means that, as in other qualitative research, there is no finite end to the data collection process therefore how do I know that this thesis is finished? The answer to this is that it is finished because it has achieved its aim of producing theory which identifies the UK wine consumer which can be construed as a hypothesis, tested, built upon and further developed by future researchers.

This was achieved by reviewing and analysing all of the relevant trade and academic literature available in chapters two and three. In chapter two this process highlighted the themes which are publicly discussed within the UK wine trade, price and the price quality relationship: brands, consumer perception and use of brands as well as the development of dominant international brands: marketing including how and which type of marketing influences the consumer: labelling and the language used to describe wine. Via the review of academic literature in chapter three the themes of culture, risk, gender and occasion were added to the basket of topics to be discussed with the four stakeholder groups the trade wine buyers, the wine producing companies, the media and wine consumers.

Chapter four described and justified the methodologies used during this thesis. From a base of very little knowledge each method of data collection had to be adapted to the needs of each stakeholder group whilst at the same time ensuring that critical praxis was maintained. This started with the use of a modified Delphi Technique to develop the interviews with the trade wine buyers. Critically analysing and reflecting upon that data supported the construction of the semi-structured interviews for the wine producing companies and wine journalists, continual reflection upon the analysis and triangulation of all the data collected enabled the final focus
groups to be run. This flexible approach ensured that the outcomes and issues raised during each stage of the research process could be incorporated into the next. It also enabled the inclusion of autoethnographical data at appropriate points to enhance and enrich the knowledge being constructed.

The eight types of trade wine buyer identified in chapter five show that this is not an homogenous group and that different groups have differing perceptions of what a UK wine consumer is. Some groups, i.e. the head office wine buyers for the large national chains, had significant amounts of power via their purchasing ability and their ability to dictate to their unit wine buyers but they had very little knowledge of the consumer for whom they bought. Conversely the unit wine buyers, particularly those in the on-trade, who had the best interaction with wine consumers felt the least empowered and therefore the least interested in a product that all were trying to sell. It had been anticipated that the independent owner operators would by their close involvement with consumers and complete control over purchasing decisions have a good understanding of wine consumer behaviour. However whilst they still had great power in their decision making it has been shown that they have as little understanding of their consumer as the distant head office trade wine buyers.

Throughout this chapter there was a constant theme that marketing, i.e. knowing what the consumer bought, was all that the trade wine buyers needed to know to develop their business and only those new to the wine trade felt that this was not enough. Whilst some of the observations on consumer behaviour were accurate and the trade wine buyers were able to discuss many of the paradoxes that their business strategies created no consideration was given to understanding why this might be. Most trade wine buyers for example reiterated the 'fact' that consumers found wine buying very stressful when the consumers themselves either denied stress, enjoyed the stress or had found previously unidentified strategies for dealing with it. A review of tables 5.1 and 9.1 shows that there are significant gaps in the trade wine buyers
understanding of their consumers probably caused by the lack of qualitative research, the marketing bias of most research leading to the reification prevalent throughout the trade.

In general the representatives of the wine producing companies, discussed in chapter six, had a much more homogeneous view of the UK wine consumer. Like the trade wine buyers they were much more concerned with marketing than understanding but were starting to use the qualitative research methods used for other FMCGs. This lack of qualitative research had not been expected since all of the companies had market research departments. It had been assumed when the wine producing companies were identified as an interested stakeholder group that before starting on the capital intensive process of developing new wines for an already over supplied market that they would have sought to understand their market if for no other reason than to sell more effectively into it. As the thesis shows this is not so, whilst the producers do react to market demand, the market demand that they often react to is that of the supermarket rather than that of the end consumer.

Although they had the ability to become emotionally involved in the product the wine producing company representatives interviewed were quite pragmatic in their approach to the product wine. They were aware of the paradox of 'natural' image versus mass production techniques for most wines and of the need not to damage this image in the mind of the consumer. They were also aware that wine plays a part in lifestyle choice. The wine producing companies deliberately used economies of scope to extend the perceived range of choice so that they could produce both every day drinking wines and aspirational wines. Despite this level of understanding of the consumers even those new to the trade were guilty of much of the trade wine buyers reification particularly in relation to stress, gender and interest in wine.

The results of the media interviews, chapter seven, were particularly interesting as they questioned their own raison d'être. What is apparent is that apart from the 'shopping list'
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journalists the wine journalists had a much closer understanding of the UK wine consumer than either the trade wine buyers or the wine producing companies. They considered that as wine is now integrated into our culture as part of our general consumption most consumers, most of the time had very little need for wine related media per se. They were able to clearly identify both low and high involvement consumers and unlike the other external stakeholder groups saw highly involved consumers as having a sophisticated relationship with wine. Like the wine producing companies they acknowledged that wine is used as part of lifestyle choice but were also aware that it is used to overtly demonstrate lifestyle choice as well. Since the wine journalists saw wine consumption as part of the norms of UK consumer consumption culture and were able to rationally describe its absorption into it they were able to articulate some of the stress related strategies which consumers currently employ. This was unlike the historic relationship described by the trade wine buyers and the wine producing companies. It also explained why the wine journalists questioned their current validity in several aspects of their work.

Chapter eight presents the results of the consumer focus groups. Their preoccupations and interaction with wine showed that they all used wine in a variety of ways which were culture, situation, occasion and gender dependant. Price while being a significant factor for on-trade purchase or consumption occasions was not necessarily the main driver for off-trade purchases. At low involvement levels the consumers felt no anxiety about purchase decisions, contradicting the trade wine buyers and wine producing companies. Some interaction with wine buying is shown to be as commonplace and functional as for any other grocery shopping (Cockburn-Wootten, 2002). The wine consumers only felt stress when making a significant purchase and identified the many different strategies which they used to ensure that they were able to purchase even for these socially significant occasions or situations. Like purchasing, consumption was not seen as stressful in low risk situations but where self image is important
then choice of drink, including wine, can be crucial to the social, cultural and economic capital being displayed.

The data gathered from each of the four stakeholder groups was used, along with my own experiences, in chapter nine to construct a summary of the profile of the UK wine consumer which is shown in table 9.1. This shows that most wine consumers moderate their main behavioural characteristics according to identifiable phenomena, adopting one of a range of wine consumer profiles to suit the specific purchase and or consumption occasion. This may be done consciously or unconsciously and indicates a sophisticated relationship with wine rather than the simple child like behavioural patterns currently assumed by many in the wine trade. The results confirm that as far as current consumers are concerned the use and consumption of wine is embedded into our cultural habitus (Demossier, 2004) and should not be considered to be a new phenomenon per se still to be learned about.

The results of this thesis show that there are significant areas where those working in the wine trade as buyers and producers do not have a full understanding of the UK wine consumer which is likely to result in some of their business strategies not achieving their full potential. This thesis also demonstrates that the academic community has been remiss in neglecting to study this area of consumer behaviour in this significant world market.

10.3. Contribution to Knowledge

The profile of the UK wine consumer was not one which I could have considered constructing before the research for this thesis began despite my being a wine consumer and wine educator. Whilst I was aware from the start of the research process that I did not have the same perceptions of the UK wine consumer as trade practitioners, I was not aware of the full range of ways in which external stakeholder groups tried, with varying degrees of success, to influence
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UK wine consumers. Nor was I aware of all of the strategies which UK consumers utilise to interact with wine. Autoethnography enabled me to contribute my own experiences to the research whilst at the same time challenging me to examine my own preconceptions and prejudices as a wine consumer and as a researcher.

As discussed in the methodology, the purpose of a grounded theory approach to research is to create a theory of knowledge in an area where there is little or no knowledge creating stepping stones upon which to build a new body of knowledge. In this instance the qualitative postmodern stance has enabled me to identify the behaviour of UK wine consumers to a depth impossible in traditional quantitative studies bound by the strictures and conventions of positivist methodologies. The depth of knowledge constructed adds significantly to our understanding of consumer behaviour in relation to the moderate purchase and consumption of wine rather than the immoderate and harmful purchase and consumption of alcohol, including wine, which is already well understood and documented.

Discussion of my profile of the UK wine consumer with those in the trade, wine educators and wine consumers leads me to believe that one part of this research process did not discovered any new form of consumer behaviour but rather that it rationalised and justified a set of behaviours which were suspected by some and denied by others. This thesis has then gone beyond that point and contributed new knowledge to the body of consumer related academic theory in several specific ways. This includes identifying three different types of wine consumer (table 9.1), low involvement, moderate involvement and high involvement consumers and showing that in differing contexts a single consumer can demonstrate behaviour applicable to any of these three groups. This thesis has identified for the first time that there are some UK wine consumers who will always retain a low involvement with wine usage whilst other consumers may have a low involvement with wine consumption but a high involvement with wine purchasing. The distinction between wine purchase and wine consumption as part of wine usage
had not been demonstrated before; wine usage being the conscious reflection of our self image via wine. This thesis also shows that consumers utilise different strategies for purchasing wine and differing rationales for consuming wine in on and off-trade situations and that these strategies are further influenced by gender. By identifying these phenomena which predict both rational and irrational approaches to wine and by demonstrating how deeply wine usage has become incorporated into the culture of most social groups within the UK this thesis adds significant new theory to the general academic body. However this thesis also demonstrates that there is much work still to be done in understanding exactly how wine is currently used in public consumption situations to demonstrate cultural and economic inclusivity or exclusivity from and by particular social groups.

This thesis has also shown that there is a gulf of understanding between those who provide and hope to sell wine and those who use and consume wine. It shows that the wine trade is often wrong in its assumptions about the motivations for consumer behaviour; that it has little understanding of how or why the next generation of wine consumers might develop. The thesis challenges current marketing theory in this area because of the discordance shown between the wine trade’s observations in relation to consumer behaviour and the actual motivations behind that behaviour as identified in this research.

Whilst it was anticipated that this study would have value for those teaching on hospitality courses it has become obvious that the results of this thesis could also contribute significantly to our understanding of the teaching and learning processes. A study of the language and teaching of wine as described in this chapter will have the benefit of enabling those of us in the teaching profession to better understand how generational distance can impact upon the student learning experience and enable us to develop our teaching and their learning techniques.
10.4. Limitations of this Research

There is, as the literature review showed, a significant amount of research into New World wine consumers by New World based academics however the culture of these communities differs from that of the UK in two fundamental aspects. The first is the historical tradition and wine drinking culture which the UK, as part of Europe, has including concepts of terroir and elitism. The concepts of wine tourism held in the Old and New wine worlds exemplifies these cultural differences. The second is that fact that the UK does not produce wine in any commercial sense unlike all other significant wine drinking nations both Old World and New. Therefore it is not possible, as Lockshin et al (2001) demonstrated, to uncritically attribute consumer behaviours identified in other cultures to the UK wine consuming population, severely limiting the value of the academic literature available to this study and the ability of this study to test its findings against that literature.

Another limitation is that academic research to this level was completely new to me when I started this thesis. My lack of experience in research techniques, approaches and methodologies along with a lack of other significant qualitative research to refer to means that this has been an evolutionary process in which even the areas to be studied have had to be identified. As a result other significant factors influencing UK wine consumer behaviour may not have been identified or fully investigated by this study.

A potentially more significant limitation to this research was in conducting only one series of consumer focus groups although all research is limited by temporal, pragmatic considerations (Patton, 2002: Crotty, 2003). As the members of each group except for the expert group, FG6, were friends it is likely that they all had common social and cultural norms and this may have come across in the results. However this is mitigated to some extent by having held the focus groups in different parts of the UK and I took care to ensure that all themes discussed in this
thesis were raised by more than one group except where there were logical cultural reasons for including them. Running a second group of consumer focus groups would also give further depth to the knowledge generated in this thesis. If the further research recommended in the next section is undertaken then this will add to our depth of knowledge perhaps negating the need for a second series of focus groups.

10.5. Further Research into UK Wine Consumer Behaviour

Historically wine consumption in the UK has had an elitist, culturally exclusive image which is still actively maintained by certain sections of the wine community. As a result although wine has become readily available and is commonly consumed throughout the UK the image of the wine, purchased, consumed or gifted, is still associated with the image of the wine user. This image has little significance for private home usage but in all other circumstances it can have a significant effect upon the wine consumer’s behaviour and needs to be incorporated into all further research as well as being investigated in its own right.

It is this linking of the product so closely with the image of the user that makes wine usage so distinctive from most other types of consumer product and consumer behaviour theory. There is very little that is aspirational or fine about the purchase of many other supermarket goods, baked beans or breakfast cereal for instance. Nor do most of these products have the gifting and public usage elements which so significantly affect wine usage. Analogies can be made perhaps to consumer behaviour related to clothing but clothing has essential element as well as the aspirational element that wine usage does not have. Jewellery may be another related consumer product, but the historical, cultural and religious symbolism that jewellery usage has within some social groups and the rejection of jewellery by others means that again the consumer behaviour related to the usage of jewellery will have unique facets which are not relevant to the study of wine usage.
For these reasons the wine related consumer behaviour was not analysed in conjunction with consumer behaviour in general. It may be that as our knowledge of wine usage develops specific links with general consumer behaviour theory will be made. As yet the themes identified in this thesis are preliminary theory; they need to be built upon and this section recommends models and themes which would benefit from further research.

10.5.1. Public Consumption

The symbolic and elitist image of wine and its ability to be used to exclude or include in public consumption situations can cause wine users stress. This can cause those not involved in wine to maintain their distance from the product to retain their social image of themselves within their cultural group. For other low involvement consumers it means that as they aspire to demonstrate inclusiveness in a variety of public consumption occasions, they cause themselves significant stress which can be both social and, in the on-trade, financial. Those who feel stress have developed a variety of strategies to deal with it. Qualitative research into the nature of the public consumption of wine would enable service providers for those environments to understand more effectively the physical and social requirements of their consumers. Whether this understanding particularly in relation to staff retention and training would have practical applications to the trade should also be an area for future research.

10.5.2. Consumer Types

The research in this thesis has created a consensus of knowledge about the UK wine consumer and their behaviour based upon four different perceptions of consumer behaviour, the trade wine buyers, wine producers, wine journalists and the consumers themselves; table 9.1. This consensus has not been tested but should be. Since many of the consumers behave in ways which appear to be based upon identifiable phenomena but which the consumers do not always acknowledge, this research would need to take a qualitative approach perhaps including
participant observation. There would also be benefit in repeating the series of focus groups in other parts of the UK (and wine consuming world) to investigate possible regional (international) behaviours so deepening our understanding. This would enable a quantitative analysis of a significant amount of demographic data (see appendix five) generating via a quantitative and qualitative analysis a deep understanding of individual rather than the group behaviour identified in this study.

10.5.3. Wine Experts

The research showed that there are a number of types of highly involved wine consumers who can all be termed wine experts and that this expertise can be demonstrated in different ways. It also suggested that this population had very sophisticated buying habits and were able to be significant influencers of less involved consumers. There is no consensus as to how large this expert population is as a whole within the UK nor the size and importance of the differing types. “Boys club” type consumers for instance are likely to have significant influence within their social group and wine bores are likely to be the buyers of very elitist and expensive wines, but who is a wine hobbyist and how do they influence others? On the basis of the different types of consumer identified in chapter nine it may be possible to construct a postal or electronic survey which could be distributed nationally to try to establish the size, demographic profile and price range of this population. A postal or internet survey is suggested because of the thoughtful, browsing, information seeking nature of this type of consumer. A follow up qualitative survey might then establish in more detail the nature of these types of experts and the ways in which they influence other wine consumers.

10.5.4. Gender

There was significant evidence of difference in buying habits between men and women, except amongst female wine experts. Gender differences have been identified in many other studies,
but in this study it seems to have a significant impact upon wine buying and or the responsibility for wine buying and a varied impact upon wine consumption. It was also established that low involvement women do not ‘buy’ wine but low involvement men may do so if it is a requirement of their social group. In particular they may be buying in public and or for their partners. The questions that arise from this are:

- Do some women consciously and consistently abdicate responsibility for buying wine, if so why?
- What is the difference between those women who choose to abdicate responsibility for wine purchasing and those who choose to become experts?
- If men always buy for their partners, do they buy what their partner really likes or what he thinks she should like?
- Does this explain the difference in consumption and perception of red and white wine between genders?
- If the primary supermarket shopper is female and not consciously buying wine whilst the male purposefully buys in more specialist outlets does this explain why brands have made so little impact upon the UK wine consumer and TV advertisements have so little positive recall?

Further qualitative research in these areas would help to further our understanding of wine behaviour; it may also support academic research in other related gender behaviour studies.

**10.5.5. The Development of a New Generation of Wine Consumers**

As this thesis has established general wine consumption throughout the entire adult population is a recent phenomenon. As such the assumptions made by many of the trade wine buyers and wine producers that a new generation would automatically move into wine during their twenties and thirties is unsubstantiated. Since the FAB market only started in 1995 it is not yet possible to say how this new beverage will affect the next generation of wine drinkers because those who
were introduced to FABs as they started buying their own alcohol would be around twenty nine now, right in the middle of the suggested progression range. The introduction of the Licensing Act 2003 in December 2005 which changed the licensing hours in England and Wales has potentially extended the range of establishments in which alcohol can be served in a way that cannot yet be fully understood. A longitudinal study of how and where those in the twenty to thirty age group consume alcohol, specifically wine, plus a comparison of the data available relating to the introduction of mass consumption wines in the 1970s might well generate significant data re our development as wine consumers and establish whether or not, against most European trends, wine has become established as a permanent and increasing part of our cultural habitus. This type of study might also identify other trigger points which could be used to encourage uninterested consumers to become involved consumers other than changes in their cultural groups.

10.5.6. Language and Labels

As the previous section discusses those working in and writing about the wine trade have raised as an issue how to attract a new generation of wine consumers. However this thesis established in chapter three that much of the language used by those in the trade, wine buyers, producers, some journalists and wine educators does not resonate with the younger generation nor some current consumers for a variety of reasons. It is likely that this exclusivity of language is another deterrent to the development of a new generation of wine consumers. Whilst tippex for the volatile acids is not such a pleasantly evocative word as pear drops and not suggested for use on wine descriptors or labels it does serve to illustrate that chasm between the reification of language in wine and language as it is used within the current population. A qualitative study using the teaching of wine courses to mature and young / novice wine consumers as its vehicle would enable an understanding of the similarities and differences in language use and generational perceptions of wine image to be constructed. It would also allow for analysis of
reification and particular generational barriers to learning within the teaching profession to be identified and understood.

10.5.7. Taste

A strong theme running throughout this thesis relates to the nature of taste, what wine should taste like and what it does taste like and how that relates to the social experience of wine consumption. There was a strong view from those in the trade that some wines are designed for and more suitable for consumption on their own, that there are others that have evolved to match foods and are less suitable for consumption on their own and that consumers would move from one style to the other over their lives. Amongst academics there was divergence of opinion as to whether or not consumers’ tastes changed with age or lifestyle; whether consumption habits changed because of peer pressure; whether change was due to the simplistic or blockbuster nature of many starter wines or if taste changed at all. There was also the suggestion that because of new technology and the impact of climate change that long established wines had actually changed in taste over the last couple of decades and maybe taste was harmonising between Old and New World styles.

An analytical, quantitative study would enable a better and more open understanding of the relationship between the actual taste of wine and consumer taste preferences. Should consumers need to ‘grow into’ a specific taste or is it the social usage they evolve into? Further qualitative studies into taste would start to redress the imbalances, discussed in this thesis, between tastes and other sensory skills and enable researchers to examine the changing sociology of taste.

10.5.8. Price

The consumers in the focus group were extremely price sensitive in the on-trade because they were acutely aware of excessive profit margins as they perceived them. However when buying
everyday wine in the off-trade there was a disparity between what they believed they paid and national average spending; various reasons were discussed for this in chapters eight and nine. There were contradictory suggestions from the trade wine buyers, the wine producers and the consumers as to what a consumer would pay for a bottle of wine from a variety of sources for a variety of occasions. In this instance the wine producing companies had a far closer understanding of wine consumers than the trade wine buyers. This demonstrated again either a lack of understanding or the deliberate obscuring of business strategies leading to reification on the part of less informed trade wine buyers. A qualitative study, using participant observation would enable the wine trade to understand who is actually buying, at what prices and why. It might also shed light on the consumers perceptions of the image of wines used as a loss leaders.

10.5.9. Promotions

This thesis has identified that wine buying can have a significant gender bias and that consumers buy with differing degrees of involvement, from the uninterested to the highly involved and motivated. It has also shown that very few types of promotion register with consumers. This thesis has identified that this may be because the promotions are not aimed at those who are actually making the purchasing decisions and or because the language or symbolism of the bottles does not resonate accurately with the actual purchaser. Qualitative research into conscious and unconscious purchase decision making may enable researchers to understand more fully the cognitive processes used by consumers when buying wine for differing occasions.

10.5.10. Wine Sales in Non-Food On-trade Environments

Whilst the consumers had a view that all wine in on-trade environments was expensive they also had a perception that wine in non-food environments was likely to be of low quality; that is all
Identifying the UK Consumer
Chapter Ten – Reflections upon the Thesis Processes and Recommendations for Further Research

except the oldest group who felt that wines in non-food environments had improved. Non-food environments tend to be pubs, clubs and bars where younger staff are hired. Since the quality of wine available to UK consumers has generally gone up, this would suggest that there is a problem of perception of low quality compounded by young, low involvement staff and extreme price sensitiveness. With the probable development of new style late night, drink based venues emerging as a result of the 2003 Licensing Act aimed at both service industry workers and the post theatre / cinema market, there is an opportunity for the wine trade to target and use these new venues to try to dispel perceptions of low quality, although as long as price is perceived as excessive consumers are likely to use perceptions of low quality to support the rejection of high buying prices.

10.6. Conclusion

Wine is no longer simply the beverage or elitist object that Bourdieu identified and that many in our society still suggest it is today. This thesis has identified that there is a large group of consumers, perhaps the majority of wine consumers, for whom wine is a fun sociable addition to their cultural life and that all involved consumers use wine in a sophisticated variety of ways. Understanding how, when and why wine is used by the adult UK population will increase our knowledge of consumer behaviour in general and add to our knowledge of wine usage and leisure time in particular. Additionally it challenges current wine related marketing theories and indicates ways in which we may be able to develop our understanding of teaching and learning processes.

When further wine related research has been undertaken it will be that the findings of this thesis are supported, that they are unsubstantiated or that they are modified. They are certainly likely to be modified over time. In all of these cases the increased generation of knowledge will have added to our understanding of the UK consumer behaviour particularly in relation to their usage
of wine as part of their cultural identity. It will also have enabled the wine trade to understand and attract the modern wine consumer more accurately than they are currently able to do. It may also enable us to add to our understanding of the teaching and learning processes.
## Appendices

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<tr>
<th>Appendix</th>
<th>Page</th>
</tr>
</thead>
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</table>
Identifying the UK Consumer
Appendices

Appendices
### An Investigation into the Socio/ Cultural Phenomena which Influence the Purchase and Consumption of Light Wines in the UK

**Study One – In Depth Interviews with Trade Wine Buyers**

<table>
<thead>
<tr>
<th><strong>Topic area</strong></th>
<th><strong>Comments</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>For whom, do you buy wine?</td>
<td></td>
</tr>
<tr>
<td>As a buyer, manager, owner etc? Autonomy, manage a category, or via committee?</td>
<td></td>
</tr>
<tr>
<td>From source or from nominated agents?</td>
<td></td>
</tr>
<tr>
<td>How much independence of choice do you have, i.e. is there a ‘must stock’ policy in operation? If so what is on the ‘must stock’ list – why?</td>
<td></td>
</tr>
<tr>
<td>How well do you know your customer base? (demographics etc)</td>
<td></td>
</tr>
<tr>
<td>Selection process</td>
<td></td>
</tr>
<tr>
<td>How are gaps in the market identified? Customer feedback, sales volumes, trade fairs, etc.</td>
<td></td>
</tr>
<tr>
<td>What types of wine are the most popular sellers, i.e. reds / whites, branded v non-branded v own label, country / region?</td>
<td></td>
</tr>
<tr>
<td>Do you have any project wines?</td>
<td></td>
</tr>
<tr>
<td>What is the order of popularity?</td>
<td></td>
</tr>
<tr>
<td>How do you know this? (Sales manager says, computer reorder etc)</td>
<td></td>
</tr>
<tr>
<td>How would you define a successful wine?</td>
<td></td>
</tr>
<tr>
<td>What are the key / main price points of the wines that you sell?</td>
<td></td>
</tr>
<tr>
<td>How many wines do you have in each price point?</td>
<td></td>
</tr>
<tr>
<td>What proportion of your sales falls in each price point?</td>
<td></td>
</tr>
<tr>
<td>Do specific styles and price points sell to specific sections of your customer base or does there appear to be a more random element to the choice process, i.e. alcoholic %seasonality, media reports, impulse or prestige buying?</td>
<td></td>
</tr>
<tr>
<td>How significant is the Christmas effect?</td>
<td></td>
</tr>
<tr>
<td>Does this apply to throughout your customer base?</td>
<td></td>
</tr>
<tr>
<td>How much choice is there in the store layout? (Complete freedom to a company template)</td>
<td></td>
</tr>
<tr>
<td>Do you think that this has an effect upon wines sales?</td>
<td></td>
</tr>
<tr>
<td>How significant would you consider the presentation of the bottle to be, both in terms of its own label and shelf positioning?</td>
<td></td>
</tr>
<tr>
<td>What do you think are other major factors which influence specific purchases?</td>
<td></td>
</tr>
<tr>
<td>How do you keep in touch with the customer base? (Mail shots etc)</td>
<td></td>
</tr>
<tr>
<td>How do you use this information?</td>
<td></td>
</tr>
<tr>
<td>How significant in choice terms is the age and/or gender of your customers? (% male to female)</td>
<td></td>
</tr>
<tr>
<td>Does the knowledgeable consumer buy differently from the general consumer?</td>
<td></td>
</tr>
<tr>
<td>In what way do these purchasing patterns vary?</td>
<td></td>
</tr>
<tr>
<td>In your experience do consumers buy differently in different environments, i.e. between the on and off trade?</td>
<td></td>
</tr>
<tr>
<td>If you think that they do, what do you think are the most likely reasons for this behaviour?</td>
<td></td>
</tr>
<tr>
<td>How much knowledge about wine do staff within the outlet have generally?</td>
<td></td>
</tr>
<tr>
<td>Who is involved in helping staff to increase their knowledge of products? Formal re informal.</td>
<td></td>
</tr>
<tr>
<td>In your experience do consumers seek advice from the staff serving them, within your outlet, in different categories of store, in restaurants etc?</td>
<td></td>
</tr>
<tr>
<td>Do you think that the advice given is useful to the consumer, and believed by them?</td>
<td></td>
</tr>
<tr>
<td>Do the consumers act on the advice that they are given?</td>
<td></td>
</tr>
<tr>
<td>Please explain your view.</td>
<td></td>
</tr>
<tr>
<td>To what extent are you involved with marketing, PR and product promotion etc?</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>What effect do these activities have on the sales of your wine, generally and specifically?</td>
<td></td>
</tr>
<tr>
<td>What other alcoholic products compete most strongly with wine sales? Why do you think that this might be?</td>
<td></td>
</tr>
<tr>
<td>How do you see wines sales and consumption patterns going in the future?</td>
<td></td>
</tr>
<tr>
<td>How did you originally enter the trade and how long have you been working in it? (Background, training)</td>
<td></td>
</tr>
<tr>
<td>What is / are your favourite drink/s?</td>
<td></td>
</tr>
</tbody>
</table>

Name: ____________________________

Job Title / Description: ____________________________

Employer / Company: ____________________________

Daytime Telephone Number: ____________________________

Additional Notes:

_________________________________________________________________

_________________________________________________________________
An Investigation into the Socio/ Cultural Phenomena which Influence the Purchase and Consumption of Light Wines in the UK.

Preparation for study two – In depth interviews with major new world wine producing companies

<table>
<thead>
<tr>
<th>Topic Area</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td></td>
</tr>
<tr>
<td>Company worked for</td>
<td></td>
</tr>
<tr>
<td>Length of time in position and with company</td>
<td></td>
</tr>
<tr>
<td>Company’s current size</td>
<td></td>
</tr>
<tr>
<td>Main brands</td>
<td></td>
</tr>
<tr>
<td>Brands specifically made / styled for the UK market</td>
<td></td>
</tr>
<tr>
<td>Current production</td>
<td></td>
</tr>
<tr>
<td>Key wine styles / grape varieties</td>
<td></td>
</tr>
<tr>
<td>Developing wine styles</td>
<td></td>
</tr>
<tr>
<td>Price points</td>
<td></td>
</tr>
<tr>
<td>Rationale</td>
<td></td>
</tr>
<tr>
<td>Key current markets</td>
<td></td>
</tr>
<tr>
<td>National / international (% exported etc)</td>
<td></td>
</tr>
<tr>
<td>Price points in each</td>
<td></td>
</tr>
<tr>
<td>Importance of UK market</td>
<td></td>
</tr>
<tr>
<td>Currently</td>
<td></td>
</tr>
<tr>
<td>Future</td>
<td></td>
</tr>
<tr>
<td>Consumers</td>
<td></td>
</tr>
<tr>
<td>Agencies, grocery chains or the end consumer</td>
<td></td>
</tr>
<tr>
<td>Who is your end consumer</td>
<td></td>
</tr>
<tr>
<td>Are there different categories of consumer</td>
<td></td>
</tr>
<tr>
<td>How do you know</td>
<td></td>
</tr>
<tr>
<td>UK consumer perceptions of, and significance of the perception</td>
<td></td>
</tr>
<tr>
<td>Company / brand</td>
<td></td>
</tr>
<tr>
<td>do consumers move up within the brand</td>
<td></td>
</tr>
<tr>
<td>what about the uninterested, experimenters and buffs?</td>
<td></td>
</tr>
<tr>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>Of bottle, label, outlet etc</td>
<td></td>
</tr>
<tr>
<td>Price promotions – why/ business philosophy?</td>
<td></td>
</tr>
<tr>
<td>serious reduction of margins</td>
<td></td>
</tr>
<tr>
<td>potential for reduced (perceptions) of quality</td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td></td>
</tr>
<tr>
<td>To whom, why</td>
<td></td>
</tr>
<tr>
<td>Most effective medium</td>
<td></td>
</tr>
<tr>
<td>Use of media / media personalities</td>
<td></td>
</tr>
<tr>
<td>Future developments</td>
<td></td>
</tr>
<tr>
<td>Expand current market / consumer base</td>
<td></td>
</tr>
<tr>
<td>Penetrate new markets</td>
<td></td>
</tr>
<tr>
<td>Expansion/ consolidation? (via wine production / out put mergers etc)</td>
<td></td>
</tr>
<tr>
<td>Rationale (why - not how)</td>
<td></td>
</tr>
<tr>
<td>Competitors</td>
<td></td>
</tr>
<tr>
<td>Other wine companies,</td>
<td></td>
</tr>
<tr>
<td>Other types of alcohol</td>
<td></td>
</tr>
<tr>
<td>Other beverage consumption</td>
<td></td>
</tr>
<tr>
<td>Future trends</td>
<td></td>
</tr>
<tr>
<td>Big brands v small individuality, two routes, would a world full of simple</td>
<td></td>
</tr>
<tr>
<td>fruity wine matter?</td>
<td></td>
</tr>
<tr>
<td>comfort v aspirational</td>
<td></td>
</tr>
<tr>
<td>novices v bored buffs</td>
<td></td>
</tr>
</tbody>
</table>
Identifying the UK Consumer
Appendix Two – Wine Producing Companies Interview Document

<table>
<thead>
<tr>
<th>What makes a good label/its significance in the purchasing decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>National styles/brands are safer in a tight market place</td>
</tr>
<tr>
<td>how does this influence if at all production strategies?</td>
</tr>
<tr>
<td>Any other comments</td>
</tr>
</tbody>
</table>

Name: ___________________________  Job Title: ___________________________

Employer: ________________________  Contact Details: _______________________

Additional Comments:

________________________________________________________________________

________________________________________________________________________
An Investigation into the Socio/Cultural Phenomena which Influence the Purchase and Consumption of Light Wines in the UK

Study Three - In Depth Interviews with Media Personalities

<table>
<thead>
<tr>
<th>Topic Area</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Background</td>
<td></td>
</tr>
<tr>
<td>Areas of media worked in</td>
<td></td>
</tr>
<tr>
<td>mainstream (weekend) papers, specialist journals, TV, radio, guest speaking, wine educator, books etc</td>
<td></td>
</tr>
<tr>
<td>rationale for working in those areas</td>
<td></td>
</tr>
<tr>
<td>Who do they write for</td>
<td></td>
</tr>
<tr>
<td>wine supplier, consumer</td>
<td></td>
</tr>
<tr>
<td>who do they see as the consumer</td>
<td></td>
</tr>
<tr>
<td>Purpose of communicating</td>
<td></td>
</tr>
<tr>
<td>to educate. to entertain</td>
<td></td>
</tr>
<tr>
<td>has the imperative from the publishers changed? i.e. do they prefer education or amusement</td>
<td></td>
</tr>
<tr>
<td>Consider the statement</td>
<td></td>
</tr>
<tr>
<td>‘articles only believed if they read within the consumers preferred choice of media’</td>
<td></td>
</tr>
<tr>
<td>How much effect do they think that they have</td>
<td></td>
</tr>
<tr>
<td>relative importance / how significant the influence exerted within each area</td>
<td></td>
</tr>
<tr>
<td>how long does their effect last</td>
<td></td>
</tr>
<tr>
<td>can they / do they start a trend</td>
<td></td>
</tr>
<tr>
<td>Buying wine can be a very stressful event</td>
<td></td>
</tr>
<tr>
<td>do they write with a view to providing comfort or aspiration</td>
<td></td>
</tr>
<tr>
<td>How do they decide upon a wine or theme to communicate about?</td>
<td></td>
</tr>
<tr>
<td>Most wines discussed in non specialist journals tend to be about wines available nationally in off trade premises and often brands why are wines with restricted distribution and / only available in the on trade discussed much less</td>
<td></td>
</tr>
<tr>
<td>What would cause them not to write about a particular product</td>
<td></td>
</tr>
<tr>
<td>How significant is the specialist media / talking to the converted Specialist journals (small readership / actual influence?) websites</td>
<td></td>
</tr>
<tr>
<td>how do they know</td>
<td></td>
</tr>
<tr>
<td>What do they think the majority of consumers want to know ‘if most of the population wants to drink simple fruity wines does that matter?’</td>
<td></td>
</tr>
<tr>
<td>Significance of Advertising campaigns, TV and written</td>
<td></td>
</tr>
<tr>
<td>Image of wine / wine consumers</td>
<td></td>
</tr>
<tr>
<td>Macho / health issues</td>
<td></td>
</tr>
<tr>
<td>Do they play / write to this at all</td>
<td></td>
</tr>
<tr>
<td>Trade wine buyers, in general, had a low opinion of wine writers: Why Independence and integrity frequently questioned how independent can a wine media presenter really be? suppliers financing trips to wine trade fairs plus expenses, free samples etc</td>
<td></td>
</tr>
<tr>
<td>Trade wine buyers often felt that competition wines ‘trophy wines’ were not always very good but obviously got a lot of publicity. Why? Some trade said that because some writers are very specialist they can help to educate the buyers themselves as to new and developing trends</td>
<td></td>
</tr>
<tr>
<td>What is their view</td>
<td></td>
</tr>
<tr>
<td>How do they see the future development of wine ‘journalism / education’ via</td>
<td></td>
</tr>
<tr>
<td>the internet and websites</td>
<td></td>
</tr>
<tr>
<td>Labels</td>
<td></td>
</tr>
<tr>
<td>Importance, what makes a good one?</td>
<td></td>
</tr>
<tr>
<td>Any other comments?</td>
<td></td>
</tr>
</tbody>
</table>

Name: ________________________________

Contact Details: ____________________________

Additional Comments:

__________________________________________

__________________________________________

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Consumers Focus Group Discussion Document – Study Four

Venue: -

Date: -

<table>
<thead>
<tr>
<th>Discussion Area</th>
<th>Covered</th>
</tr>
</thead>
<tbody>
<tr>
<td>What alcoholic beverages are drunk</td>
<td></td>
</tr>
<tr>
<td>How much is wine / beer / spirits / favourite drink etc</td>
<td></td>
</tr>
<tr>
<td>When did you first start to drink wine?</td>
<td></td>
</tr>
<tr>
<td>Growing up in a wine drinking family, via friends, work, lifestyle etc?</td>
<td></td>
</tr>
<tr>
<td>How do you choose wine</td>
<td></td>
</tr>
<tr>
<td>On Trade v Off trade</td>
<td></td>
</tr>
<tr>
<td>Price, promotions (price reduction, 2 for £10, simple company recommendation), word of mouth, past knowledge, alcohol level</td>
<td></td>
</tr>
<tr>
<td>Media Influence, if any</td>
<td></td>
</tr>
<tr>
<td>TV radio, books, point of sales information specialist magazines, prize winning wines, sponsorship of TV programmes, TV advertising</td>
<td></td>
</tr>
<tr>
<td>Where is it easier to buy wine</td>
<td></td>
</tr>
<tr>
<td>On trade v off trade (stress / fear)</td>
<td></td>
</tr>
<tr>
<td>Why?</td>
<td></td>
</tr>
<tr>
<td>Who in the household actually buys the wine? Why?</td>
<td></td>
</tr>
<tr>
<td>When do you buy wine</td>
<td></td>
</tr>
<tr>
<td>With other shopping, special purchase, only in on trade</td>
<td></td>
</tr>
<tr>
<td>Weekdays v weekends</td>
<td></td>
</tr>
<tr>
<td>What do you think of the range of wine available, in supermarkets, specialists, pubs, restaurants?</td>
<td></td>
</tr>
<tr>
<td>Is the range tailored to what you want?</td>
<td></td>
</tr>
<tr>
<td>Where and in what type of social situation do you drink wine, Home, pubs clubs, alone, with friends</td>
<td></td>
</tr>
<tr>
<td>Do you ever feel pressured into either drinking or not drinking wine</td>
<td></td>
</tr>
<tr>
<td>Would rather have had a beer, type of place, others in group</td>
<td></td>
</tr>
<tr>
<td>Staff</td>
<td></td>
</tr>
<tr>
<td>On trade, sommeliers, waiters</td>
<td></td>
</tr>
<tr>
<td>Off trade, shop assistants</td>
<td></td>
</tr>
<tr>
<td>email and mail order staff support</td>
<td></td>
</tr>
<tr>
<td>Image</td>
<td></td>
</tr>
<tr>
<td>Perceived by others, perceived by self</td>
<td></td>
</tr>
<tr>
<td>Political statement, health</td>
<td></td>
</tr>
<tr>
<td>Connection with drunkenness (if any)</td>
<td></td>
</tr>
<tr>
<td>What is the normal price range for wine</td>
<td></td>
</tr>
<tr>
<td>On trade, off trade, gift</td>
<td></td>
</tr>
<tr>
<td>How is price related to the social situation?</td>
<td></td>
</tr>
<tr>
<td>At home, dinner party, gift</td>
<td></td>
</tr>
<tr>
<td>When buying gifts</td>
<td></td>
</tr>
<tr>
<td>Trade up, trade down, when? Why?</td>
<td></td>
</tr>
<tr>
<td>How much do they know about wine</td>
<td></td>
</tr>
<tr>
<td>How it’s made</td>
<td></td>
</tr>
<tr>
<td>Visits to wineries, this country / abroad</td>
<td></td>
</tr>
<tr>
<td>Does it matter does it influence their buying / drinking behaviour</td>
<td></td>
</tr>
<tr>
<td>Wine making countries</td>
<td></td>
</tr>
<tr>
<td>Where would they buy from, where wouldn’t they, why?</td>
<td></td>
</tr>
<tr>
<td>Wines styles</td>
<td></td>
</tr>
<tr>
<td>Do they drink the same as they always have or do they like to experiment? Why?</td>
<td></td>
</tr>
<tr>
<td>Are wines still the same or have they changed</td>
<td></td>
</tr>
<tr>
<td>Mood</td>
<td></td>
</tr>
<tr>
<td>Do you buy differently if in a good or bad mood with self or others?</td>
<td></td>
</tr>
</tbody>
</table>
## During and after wine tasting

<table>
<thead>
<tr>
<th>Discussion area</th>
<th>Covered</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Whilst Wine Tasting</strong></td>
<td></td>
</tr>
<tr>
<td>Which wines do you like which dislike</td>
<td></td>
</tr>
<tr>
<td>Why</td>
<td></td>
</tr>
<tr>
<td>What are they, where do they come from</td>
<td></td>
</tr>
<tr>
<td>Price of wines</td>
<td></td>
</tr>
<tr>
<td><strong>After the tasting when the wines and prices are known</strong></td>
<td></td>
</tr>
<tr>
<td>What is their view of the wine now</td>
<td></td>
</tr>
<tr>
<td>Why</td>
<td></td>
</tr>
<tr>
<td>Where would they expect to buy these wines?</td>
<td></td>
</tr>
<tr>
<td>Are they priced correctly</td>
<td></td>
</tr>
<tr>
<td>Does this make them question any of the views they gave earlier?</td>
<td></td>
</tr>
<tr>
<td>Labels</td>
<td></td>
</tr>
<tr>
<td>What looks good to you, price quality relationship</td>
<td></td>
</tr>
<tr>
<td><strong>Use label board</strong></td>
<td></td>
</tr>
<tr>
<td>Back labels</td>
<td></td>
</tr>
<tr>
<td>Do you look</td>
<td></td>
</tr>
<tr>
<td>Does what is written prompt purchase</td>
<td></td>
</tr>
<tr>
<td>How much do they know about wine companies?</td>
<td></td>
</tr>
<tr>
<td>Does the brand matter?</td>
<td></td>
</tr>
<tr>
<td>Do they look for a brand / known name when buying / in what circumstances</td>
<td></td>
</tr>
<tr>
<td>Would they look for a specific brand, wine making company and they buy from that company at different price levels for different occasions, i.e. always look for the Gallo name?</td>
<td></td>
</tr>
<tr>
<td>Do they prefer to buy from known brands or do brands repel?</td>
<td></td>
</tr>
<tr>
<td>Does behaviour depend upon the situation or brand?</td>
<td></td>
</tr>
<tr>
<td>What is a wine brand any way?</td>
<td></td>
</tr>
<tr>
<td>Do they see their wine consumption patterns changing?</td>
<td></td>
</tr>
<tr>
<td>If so how</td>
<td></td>
</tr>
<tr>
<td>Have you ever read an article / seen a TV programme and contacted the writer / presented to find out more?</td>
<td></td>
</tr>
<tr>
<td>Ever been stimulated by a programme (radio or TV) or article to find out more?</td>
<td></td>
</tr>
<tr>
<td>If you read the weekend papers do you think that the wine articles are helpful or not?</td>
<td></td>
</tr>
<tr>
<td>Are there any wines that you can’t buy (easily) and would like to?</td>
<td></td>
</tr>
<tr>
<td>What are they, why aren’t they available to you?</td>
<td></td>
</tr>
</tbody>
</table>

Any Additional Comments
Focus Group Participant Personal Profile
All information given will be treated confidentially.

Venue: 
Date: 

1. Gender
   - Male
   - Female

2. Which county of the UK do you live in?

3. How long have you lived there?

4. Age
   - 18 - 24
   - 25 - 29
   - 30 - 34
   - 35 - 39
   - 40 - 44
   - 45 - 49
   - 50 - 54
   - 55 - 59
   - 60 - 64
   - 65 +

5. Marital status
   - Single / no children
   - Single / with children
   - Married / living with Partner / no children
   - Married / living with Partner / with children
   - Other

6. Please specify the number and age of your children, if relevant.
   - Number
   - Age/s

7. Total Household Income per annum
   - Under £9,999
   - £10,000 - £14,999
   - £15,000 - £19,999
   - £20,000 - £24,999
   - £25,000 - £29,999
   - £30,000 - £39,999
   - £40,000 - £49,999
   - £50,000 - £59,999
   - £60,000 - £79,999
   - £80,000 - £89,999
   - Over £90,000

8. Do you drive?
   - Yes
   - No

9. What is your occupation?
   - Director
   - Manager
   - Self Employed
   - Skilled Trade
   - Manual Worker
   - Office Worker
   - Shop Worker

10. How many holidays do you normally have in one year and how long are they for? (Please tick all that apply.)
   - No. Length of Holiday in Days
     - 2 - 3
     - 4 - 7
     - 8 - 14
     - 14+
     - One
     - Two
     - Three
     - More

11. Which of the following countries have you visited / travelled within? (Please tick all that apply.)
   - Country
     - Argentina
     - Austria
     - Benelux
     - Bulgaria
     - Canada
     - Chile
     - France
     - Germany
     - Greece
     - Hungary
     - Italy
     - New Zealand
     - Portugal
     - Romania
     - Scandinavia
     - South Africa
     - Spain
     - Switzerland
     - Turkey
     - UK
     - USA
     - Other - i.e.
Identifying the UK Consumer
Appendix Five – Consumer Demographic Details Questionnaire

12. Which of the following Newspapers do you read? (Please tick all that apply.)

Daily
- Daily Mail
- Daily Star
- Daily Telegraph
- Express
- Financial Times
- Guardian
- Independent
- Mirror
- Scotsman
- Sun
- Times
- Regional Daily
- None

Weekend
- Express
- Independent
- Mail
- News of the World
- Observer
- Scotland on Sunday
- Sunday Post
- Telegraph
- The People
- Wales on Sunday
- Guardian
- Weekend FT

Other Please Specify: ______________________

13. Which newspaper/s do you read most frequently? Please write never if you never/rarely read one of the following.

Daily

Saturday

Sunday

14. Where do you shop for food and groceries? (Please tick all that apply)

- 7-Eleven
- Aldi
- Asda
- Co-Operative
- Gateway/ So Lo
- Iceland
- Kwik Save
- Lidl
- Local / Corner Shop
- Marks & Spencer
- Morrisons /Safeway
- Petrol Forecourt Shop
- Presto
- Sainsbury’s
- Spar
- Somerfield
- Tesco
- Tesco Metro
- Waitrose
- Other Supermarket
- Please Specify: ______________________

15. Which shops do you use the most?

Main

Second

16. Where do you buy your alcoholic beverages? (Please tick all that apply.)

Regularly

Have

Supermarket

Off Licence Chain

Off Licence Independent

Wine warehouse

Mail Order

Email / Internet

From Vineyard

Other: ______________________

17. Which is your preferred choice of alcoholic beverage? (Please tick all that apply.)

<table>
<thead>
<tr>
<th>Drink</th>
<th>Average No of Times Consumed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Never</td>
</tr>
<tr>
<td>Beer</td>
<td></td>
</tr>
<tr>
<td>Lager</td>
<td></td>
</tr>
<tr>
<td>Cider</td>
<td></td>
</tr>
<tr>
<td>Wine</td>
<td></td>
</tr>
<tr>
<td>Spirits</td>
<td></td>
</tr>
<tr>
<td>Flavoured Alcoholic Beverage</td>
<td></td>
</tr>
<tr>
<td>Other – e.g.</td>
<td></td>
</tr>
</tbody>
</table>

18. Do you drink wine in any of the following types of places or situations? (Please tick all that apply.)

<table>
<thead>
<tr>
<th></th>
<th>Home</th>
<th>Pub</th>
<th>Restaurant</th>
<th>Club</th>
</tr>
</thead>
<tbody>
<tr>
<td>On its own</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>With food</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On your own</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>With family / friends</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. How often do you go out on average per month? (Please complete all that apply.)

<table>
<thead>
<tr>
<th></th>
<th>Friends</th>
<th>Pub</th>
<th>Restaurant</th>
<th>Club</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drinks only</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meal &amp; drinks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20. How often, on average per month, do you have friends to your home?

For drinks

For a meal

Thank you for your time.
## Consumer Focus Groups Observations on Wine Blind Tasting

**Venue:**

**Date:**

**First Name:**

<table>
<thead>
<tr>
<th>Blind Comments</th>
<th>Wine One</th>
<th>Wine Two</th>
<th>Wine Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Like, Dislike or Neutral</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reason for Above Choice</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country of Origin</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approximate Supermarket Price</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Would you buy the wine or not?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional Comments after Wines Revealed**

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Country of Origin

Approximate Supermarket Price

Would you buy the wine or not?
Identifying the UK Wine Consumer

Bibliography

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