

International Comparison of Consumer Choice for Wine: A Twelve Country Comparison

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Abstract

This paper presents the initial results at a country level for a twelve country study of the influencers of consumer choice for wine in retail stores. Using the Best-Worst method the design was replicated in each market to enable the comparison of the influencers of consumer wine choice behaviour across the markets. This is the first paper to present all data for the retail set and presents data at the national level. Further work is underway involving segmentation analysis to identify what segments empirically exist in what markets. The key findings are the global importance of influencers such as previous trial and recommendations and the variation from some markets to others of influencers such as brand, grape variety, food matching and medals/awards. There is an almost global ranking of the least influencer on wine choice of low alcohol level (<13%) and promotional displays.

Introduction

Cross-national research is becoming imperative in this age of globalisation. Firms have to understand the similarities and differences between countries in order to devise efficient brand marketing strategies. However, one of the major issues is trying to accurately measure similarities and differences between countries. Typical market research uses rating scales, which have problems with bias both within and across different cultures. Often when investigating what influences product choice, these biases result in so much variability, that many attributes are deemed important. This project utilises a different method to elicit the attributes wine consumers find important and unimportant when buying wine in a retail store. The same survey was used in 12 wine consuming countries as both a test of the method and to help wine marketers understand the similarities and differences between these countries' wine consumers. This project was introduced at a previous wine business conference with results from only 2 countries. In order to present the data from 12 countries, within the limitations of this paper, only a brief discussion of the method follows. For literature reviews and more discussion of method see Goodman, Lockshin & Cohen (2005, 2006, 2008). The orientation of this paper is to present the findings, for the first time, of all 12 markets involved in what is a multi-country study involving a large number of academic researchers. Future publications will enable the inclusion of the literature reviews (Goodman et al 2005, 2006, 2008) along with the 12 country data.

This research uses a new method called Best-Worst Scaling (also known as Max-Diffs), details of the method are available in Cohen and Markowitz (2002), Finn and Louviere (1992) and Marley and Louviere (2005). In addition to the normal demographic data, involvement levels and consumption frequency, a section of the survey uses a series of 13 tables (see example Table 1) to compare the true importance of the 13 attributes tested that influence wine choice. Each table consists of 4 'influence attributes'; each attribute appears an equal number of times across the survey and equally against each other attribute in the total set. This method allows better comparisons among countries and segments.

Much of the literature on attribute importance in wine marketing is based on surveys, where consumers respond to questions on the importance of various intrinsic and extrinsic attributes. However, unless one alternative or attribute clearly dominates, it is difficult to identify the most important attribute or most preferred product. Treating the category ratings as equal interval scales may generate different conclusions than if they are treated as ordinal scales (e.g., relying upon median or 'top box' scores). Often the differences may be statistically significant, but it is difficult to assess whether a rating of 5.6 out of 7 is meaningfully different from 5.1 out of 7.

What weighting scheme to apply to category ratings, or whether to rely on the alternative with the highest top box ratings, is a well-recognized problem in the case of purchase intention scales (see Morrison 1979, Jamieson and Bass 1989). Another issue is that each attribute is frequently measured with a single item rating scale newly developed just for the survey, so the reliability and validity of the scale is unknown. Attributes are usually not measured relative to other attributes or even products which must compete for the same (necessarily limited) consumer resources. Even if they are, respondents often are not allowed to indicate that they like many (if not all!) of them. Although some individuals truly might like nearly every attribute or combination, such responses don't provide adequate discrimination to help managers identify real priorities (Finn and Louviere 1992). The Best-Worse method avoids scale bias of response styles and cultural issues.

Respondents are then asked the question related to the two situations: for On-premise “Remember the last time you had wine with a meal with friends in a restaurant”; or for Retail “Remember the last time you bought a bottle of wine in a shop to have for dinner with friends” and instructed to, in each table, indicate the one that MOST (Best) and the one that LEAST (Worst) influenced their decision. The specific situation for retail purchase was selected as a ‘standard’ to avoid situations where people’s criteria might vary due to purchases for gifts, cellaring, or special occasions. This paper reports only the results for retail stores. Data were collected using different techniques depending on our collaborators in each country; some data were collected online, others as mall intercepts, in-store surveys or various combinations. We focused on recruiting wine drinkers as the key population of interest.

Table 1: Example of One Table of a Best-Worse Choice Experiment

Worst / Least	Issue / attribute	Best / Most
	1. Grape variety	x
	2. Brand name	
x	3. Medal / award	
	4. Origin	

The data is transformed and analyzed, where the total number of times each attribute is mentioned as ‘worst’ is subtracted from the number of times it is mentioned as ‘best’, leaving a score which is then standardized to enable samples with different numbers of respondents to be compared. There is much more reliability to the process and results, compared to the standard 1-7 Likert-type scale (Marley and Louviere 2005). For a detailed discussion of the method and its application in the wine sector, see Goodman, Lockshin and Cohen (2005; 2006; 2008), which demonstrates a range of results that can be used to discriminate amongst various segments and used to assist in focusing the marketing effort. The results are referred to as a ‘level of importance’. Each attribute has a coefficient, which is a ratio-level representation of its value to the consumer. The nature of the method and resulting analysis means the numerical score is not just a rank order, but shows the degree of preference and can be compared between countries and segments to indicate similarities and differences.

It is important to note, the negative scores are not negative influences, but just the way the scale is produced; the larger the negative, the less important the feature, the higher the score the more of an influence it is in the decision. Because the scores presented below are standardized, they can be directly compared. In some countries, one item stands above the rest in importance and in others several items have similar scores, but are lower than the highest other countries. This

indicates shared importance of a few items in some countries, but very clearly a single important item in others.

This paper is focused on comparative results; there is much more detail in earlier published pieces on this method in the wine marketing area (see for example Goodman, Lockshin & Cohen 2005, 2006, 2008). As a twelve country collaborative study with much data to present and discuss, the emphasis here is on the presentation of this data.

Retail Store Choice Results – Market by Market

The choice set of influencers was developed through a series of consulting with the literature, qualitative discussion with industry practitioners and pilot testing. Figure 2 shows the choice influence attributes in rank order for the Australian retail setting, showing, to some extent, what practitioners and researchers have suspected – that tasting the wine previously and someone recommending are key – followed by grape variety and origin of the wine (country or region). Due to the nature of the Best-Worst (BW) scale, the differences in magnitude of each column are ‘real’ distances, for example ‘tasting the wine previously’ can be viewed as twice as important as ‘someone recommended it’, which in turn is twice as important as ‘origin of the wine’. Those which feature below the line are in fact viewed as ‘least’ to the extent they are not important influence attributes. Whilst there is no startling revelation in the sample as a whole, it does appear that ‘in the store, point of purchase, nice labels’ information might in fact be too late to influence decisions – these decisions are likely to be influenced by prior exposure, staff/friend suggestions or production decisions such as region, varietal and quality (medals/awards) although general branding and publicity (read about it) do contribute to influencing choice.

Table 2: Retail Influencers – Australia

<i>AUS (n=305)</i>		
Rank	Attribute	BW Std
1	Tasted the wine previously	65
2	Someone recommended it	31
3	Grape variety	23
4	Origin of the wine	15
5	Brand name	15
6	Medal / award	12
7	I read about it	0
8	<i>Matching food</i>	-7
9	<i>Information on back label</i>	-7
10	<i>Information on the shelf</i>	-22
11	<i>An attractive front label</i>	-26
12	<i>Promotional display in-store</i>	-35
13	<i>Alcohol level below 13%</i>	-66

Table 3 shows the results from the Austrian sample. The two top influencers on choice in a retail setting show the importance of getting the variety right and making sure people have tasted it. This infers that the Austrian market may be served through using and labelling the right variety (which may change over time), and therefore the importance of research into consumer preferences for variety. Varietal is more important as an influencer than in Australia, as is the matching with food – a possible avenue for wine marketers to communicate the food matching of Australian wines to local food choices and styles. The fact that the first two items in Austria are quite close means they have about the same importance. This contrasts with the most important item in Australia, which is twice as important as the next one.

Table 3: Retail Influencers - Austria

Austria (n=182)		
Rank	Attribute	BW Std
1	Grape variety	36
2	Tasted the wine previously	34
3	Origin of the wine	25
4	Matching food	24
5	An attractive front label	6
6	Information on back label	5
7	Someone recommended	1
8	Brand name	-7
9	Medal / award	-7
10	I read about it	-17
11	Information on the shelf	-18
12	Alcohol level below 13%	-31
13	Promotional display in-store	-50

When looking at emerging markets like Brazil (Table 4), there are similarities to Australian influencers, but also some distinct differences, notably in the area of brand influence. This is similar to the China results (discussed below) and shows the opportunity for classical brand development strategies for Australian wines. Matching food is much more of an influence than in Australia, and Brazilian cuisine throws some opportunities for wines, particularly shorter-term return whites. Grape variety was less important than Australia, and much less than other markets – again a signal for an opportunity to develop blended wines, to match food and build a brand around. Although ‘tasted the wine previously’ is second most important, it is less so than Australia and might signal a willingness to discover something new with a known brand.

Table 4 Retail Influencers - Brazil

Brazil (n=293)		
Rank	Attribute	BW Std
1	Brand name	60
2	Tasted the wine previously	40
3	Matching food	26
4	Someone recommended it	20
5	Origin of the wine	19
6	Grape variety	14
7	I read about it	-11
8	Information on the shelf	-19
9	Information on back label	-20
10	Alcohol level below 13%	-23
11	Promotional display in-store	-24
12	Medal / award	-37
13	An attractive front label	-44

The analysis of the Chinese market shows the importance of the old fashioned need to build the brand (Table 5). Unlike some country data (Australia and UK for example), there is much less differentiation amongst the influencers, with the first three not having much distance between them. Overall, these have a much smaller coefficient than the top one in Australia or the UK, showing there is less overall effect of these than the top one in the other countries. Two of the

top three are shared with UK and Australia, while information on the back label was only a marginal influence, as was the presence of a medal/award. Again, grape variety was less important as was attractive front label. The Chinese do not typically drink wine with food, except in Western restaurants, so matching food has little importance. However, brand and origin are quite important there. The lower overall scores in China may indicate an undeveloped wine market, where buyers do not have much experience or just variation among the consumers surveyed.

Table 5 Retail Influencers – China

China (n=197)		
Rank	Attribute	BW Std
1	Brand name	37
2	Tasted the wine previously	34
3	Origin of the wine	31
4	Someone recommended it	22
5	Medal / award	4
6	Information on back label	1
7	<i>Grape variety</i>	-7
8	<i>I read about it</i>	-11
9	<i>Promotional display in-store</i>	-11
10	<i>Information on the shelf</i>	-16
11	<i>An attractive front label</i>	-22
12	<i>Matching food</i>	-25
13	<i>Alcohol level below 13%</i>	-36

France, the most ‘traditional’ of markets shows just how traditional when looking at the results (Table 6), where ‘matching food’ is the most important influencer, significantly different from Australian (and most other country) retail influencers. Remember, this is important in a *retail* setting. This is also true of the origin of the wine, which is almost as important. Interestingly, whilst this would suggest a conservative, unexperiential approach, in fact these two influencers are possibly guiding ‘rules’ for choice, whilst ‘having had the wine before’ is much less of an influence than in Australia. It is still important, but much less so. When you think of the French appellation system (for those who get to know it) its rigidity is used by consumers to enable their choices. French consumers are possibly more confident than Australians as they are less likely to be influenced by others.

Table 6 Retail Influencers - France

France (n=154)		
Rank	Attribute	BW Std
1	Matching food	44
2	Origin of the wine	40
3	Tasted the wine previously	36
4	Grape variety	18
5	Someone recommended it	13
6	Medal / award	12
7	Brand name	6
8	I read about it	0
9	Promotional display in-store	-19
10	Information on back label	-23
11	An attractive front label	-40
12	Information on the shelf	-43
13	Alcohol level below 13%	-44

The German data (Table 7) show more differentiation amongst the attributes than the Chinese. Whilst previous taste is the most important, there is little difference between the influence of someone recommending it and the need to match food. The Germans score more highly than other countries on the influence of other people. There is a gap of difference down to origin and then again to grape variety, with back label information a slight influence. ‘Marketing’ efforts such as brand, attractive front labels, promotional displays in-store, shelf information all rate as less important influences.

Table 7 Retail Influencers – Germany

Germany (n=160)		
Rank	Attribute	BW Std
1	Tasted the wine previously	50
2	Someone recommended it	38
3	Matching food	33
4	Origin of the wine	24
5	Grape variety	14
6	Information on back label	7
7	<i>Information on the shelf</i>	-2
8	<i>I read about it</i>	-4
9	<i>An attractive front label</i>	-10
10	<i>Medal / award</i>	-14
11	<i>Brand name</i>	-21
12	<i>Promotional display in-store</i>	-45
13	<i>Alcohol level below 13%</i>	-68

In a quite different wine market such as Israel, one would intuitively expect quite different results. Table 8 shows this to some extent to be true. In a market that is developing more wine consumers, we see the importance of relying on previous experience, with previous tasting being the most important influencer. It is three times more important than the second influencer of matching food and four times that of someone’s recommendation, which is roughly equal to brand name, grape variety and reading about the wine. The Israelis feel strongly about previous experience, since it has such a high overall score. It will be interesting to compare at a later date to see how these influencers develop in their differentiation over time as the wine market develops. Over time, will the influence of previous tasting become less pronounced, or will there be a split between influencers 3-6? Which ones will become more pronounced, which ones less important? Following this development and identifying patterns may assist in adapting, meeting and shaping the marketplace in such developing marketplaces as Brazil, China, and Israel. Again, most ‘marketing effort’ is seen to have little influence with the exception of ‘reading about it’ and ‘brand name’.

Another ‘classic’ wine market, Italy (Table 9) highlights how much more important matching food is in markets such as this than in Australia. Although in contrast to France, the most important influencer is previous trial. Are the Italians more set in their ways than the French? Is there more reliance on self-knowledge than appellation systems? Grape variety is of less importance than in Australia, whilst reading about the wine more so. France and Italy demonstrate the need to understand local markets and position wine’s individual offerings with local cuisine.

Table 8: Retail Influencers - Israel

Israel (n=184)		
Rank	Attribute	BW Std
1	Tasted the wine previously	76
2	Matching food	23
3	Someone recommended it	18
4	Brand name	18
5	Grape variety	17
6	I read about it	17
7	Medal / award	-4
8	Information on back label	-17
9	Promotional display in-store	-18
10	Origin of the wine	-21
11	An attractive front label	-30
12	Information on the shelf	-32
13	Alcohol level below 13%	-46

Table 9 Retail Influencers - Italy

Italy (n=314)		
Rank	Attribute	BW Std
1	Tasted the wine previously	47
2	Matching food	42
3	Origin of the wine	19
4	I read about it	16
5	Information on back label	11
6	Grape variety	10
7	Someone recommended it	9
8	Brand name	0
9	Medal / award	-5
10	Information on the shelf	-30
11	An attractive front label	-37
12	Alcohol level below 13%	-39
13	Promotional display in-store	-43

Much closer to Australia, the New Zealand data (Table 10) shows us the common links between consumers of both markets. But, for each similarity there are differences, emphasising the importance of getting to know the consumers in each market. Grape variety, for example, in New Zealand is much stronger an influence than in Australia, as are the evidence of medals/awards and to a lesser extent brand names. Consumers are less influenced than in Australia by someone's recommendation – a trait common with old Europe.

Table 10 Retail Influencers – New Zealand

New Zealand (n=364)		
Rank	Attribute	BW Std
1	Tasted the wine previously	65
2	Grape variety	38
3	Medal / award	27
4	Brand name	25
5	Someone recommended it	23
6	Origin of the wine	19
7	I read about it	-9
8	Matching food	-19
9	Promotional display in-store	-22
10	Information on back label	-24
11	An attractive front label	-25
12	Information on the shelf	-27
13	Alcohol level below 13%	-71

Table 11 shows the influencers for choice in the Taiwan retail setting. Similar to other markets, ‘tasted the wine previously’ and ‘someone’s recommendation’ are the biggest influencers. Quite distinct from other markets though, is the third biggest influence of ‘having read about the wine’, an equal influence with the ‘origin of the wine’. This suggests that newer origins, like Australia, might grow through having press coverage of a brand or of medal and awards given. The least influencers for the Taiwan data are somewhat similar to the Australian results.

Table 11: Retail Influencers – Taiwan

Taiwan (n=317)		
Rank	Attribute	BW Std
1	Tasted the wine previously	56
2	Someone recommended it	36
3	I read about it	19
4	Origin of the wine	19
5	Medal / award	13
6	Brand name	4
7	Grape variety	1
8	<i>Information on back label</i>	-16
9	<i>Matching food</i>	-18
10	<i>Promotional display in-store</i>	-19
11	<i>Information on the shelf</i>	-22
12	<i>An attractive front label</i>	-24
13	<i>Alcohol level below 13%</i>	-49

Table 12 shows the results from the UK analysis. Having tasted the wine previously is the most influential, more than twice that of any other attribute, whilst someone’s recommendation is nearly twice as important as the origin of the wine or the information on the back label, giving some credit to those Australian brands that ‘sell the sunshine and Aussie lifestyle’ on the back labels. Alternatively of course is that if this is not the information the consumer is looking for on the back of the bottle then Australia risks becoming ‘tacky, cliched’ wines. This in itself is vital research as to what information UK consumers are looking for on the back label. Brand name has a small influence and is not much different from reading about the wine, the grape variety, or matching food. Interesting is the number of attributes that scored ‘least’ including attractive

labels, promotional displays in-store and grape variety. The alcohol content is by far the least important.

Table 12: Retail Influencers – UK

UK (n=303)		
Rank	Attribute	BW Std
1	Tasted the wine previously	56
2	Someone recommended it	22
3	Origin of the wine	12
4	Information on back label	11
5	Brand name	2
6	<i>I read about it</i>	-03
7	<i>Grape variety</i>	-03
8	<i>Matching food</i>	-05
9	<i>Information on the shelf</i>	-07
10	<i>Promotional display in-store</i>	-10
11	<i>Medal / award</i>	-11
12	<i>An attractive front label</i>	-19
13	<i>Alcohol level below 13%</i>	-44

Another Anglo-market, the USA (Table 13), shows the similarities to Australia might be one of the success factors behind the marketing of Australian wines there – Australian wine marketers understand them because they are quite like themselves (distribution systems aside). The top five influencers are in the same rank order as Australia, with quite similar standardised scores, even to the point of origin and brand being ranked with identical standardised scores. There are still some opportunities that this approach can identify even in such similar markets. For example in the USA, matching food is more of an influence, along with attractive front label than here in Australia, whilst medals/awards are less so.

Table 13 Retail Influencers - USA

USA (n=196)		
Rank	Attribute	BW Std
1	Tasted the wine previously	54
2	Someone recommended it	33
3	Grape variety	18
4	Origin of the wine	9
5	Brand name	9
6	Matching food	7
7	Medal / award	3
8	<i>I read about it</i>	1
9	<i>An attractive front label</i>	-7
10	<i>Information on the shelf</i>	-11
11	<i>Information on back label</i>	-18
12	<i>Promotional display in-store</i>	-25
13	<i>Alcohol level below 13%</i>	-74

Retail Market Comparisons

Figure 1 compares the results of each country, ranked in order of the Australian data. Whilst this is only at a sample level and segmentation using variables such as gender, income, and involvement needs to be carried out, it begins to show us similarities and differences in markets.

The chart can show us areas that standardised marketing approaches might be most useful and areas where adaptation is needed. In most markets, having tried the wine previously is the most important. China and Brazil differ here, suggesting that these may be markets, with possibly others like it, where various generic and private sub-brands can form a beachhead to make way for later successful growth, although there is still an ‘origin’ effect that needs to be reinforced. France is more influenced by food matching – and possibly this reflects the reliance, or use, of the appellation system as a quality and style guide. The influence of someone recommending a wine is much more pronounced in Germany, Taiwan and the USA than the UK, Italy, China and Israel. Whilst the grape variety shows a significant difference in the UK and China, it is less influential in others. The origin of the wine was less important in Israel, but nearly twice more important in Germany and China than the UK and Australia.

Brand name is a ‘least’ influence in Germany and Austria, where marketers will have to work across a much broader approach than ‘branding’ In the UK this is a marginal positive, has a similar influence in Australia and Israel and is much more pronounced in China and Brazil. Medals and awards are ‘best’ influencers in Australia and China but are ‘least’ influencers in Germany, UK and Israel – going into these markets with ‘bling’ might not work, in fact it might be assist in achieving the opposite effect. Food matching is important in France, Italy, Brazil, Austria, Israel and Germany but not so in the other markets. This offers the market scope to position product or brands as ‘food pairs’ – but it might have little effect in other markets where choosing wine is not a food matching issue, something that goes against the long worn out ‘white with fish, red with meat’ line. Perhaps in some markets consumers are enjoying the wine they want regardless of the old school rules? Research is needed in markets like Germany and the UK as to what sort of information consumers are looking for on back labels to better assist marketing meet demand as in both these markets this is a positive influence.

Conclusions and Further Research

This research offers much to this point in terms of understanding key differences between countries. Further analysis, using approaches such as regression and factor analysis, may offer a rigorous approach to determine similarities and differences, whilst comparing countries might enable the identification of similar ‘cultural markets’ (Old World: New World; Developed: Developing; Anglo: Old Europe, etc.). In addition, and in conjunction to this further analysis, the data set offers the opportunity to delve much further and conduct segmentation analysis to identify if and where different segments of the market exist in terms of decision influencers for wine. This offers much to the academic as well as to the practitioner. Segmentation, using just the standardised Best:Worst scores, or factor analysis or regression will enable the ‘mapping’ of the influencers of the segments of the market place – testing whether nationality or other grouping variables are more important in understanding consumer choice for wines (Lockshin et al. 2001).

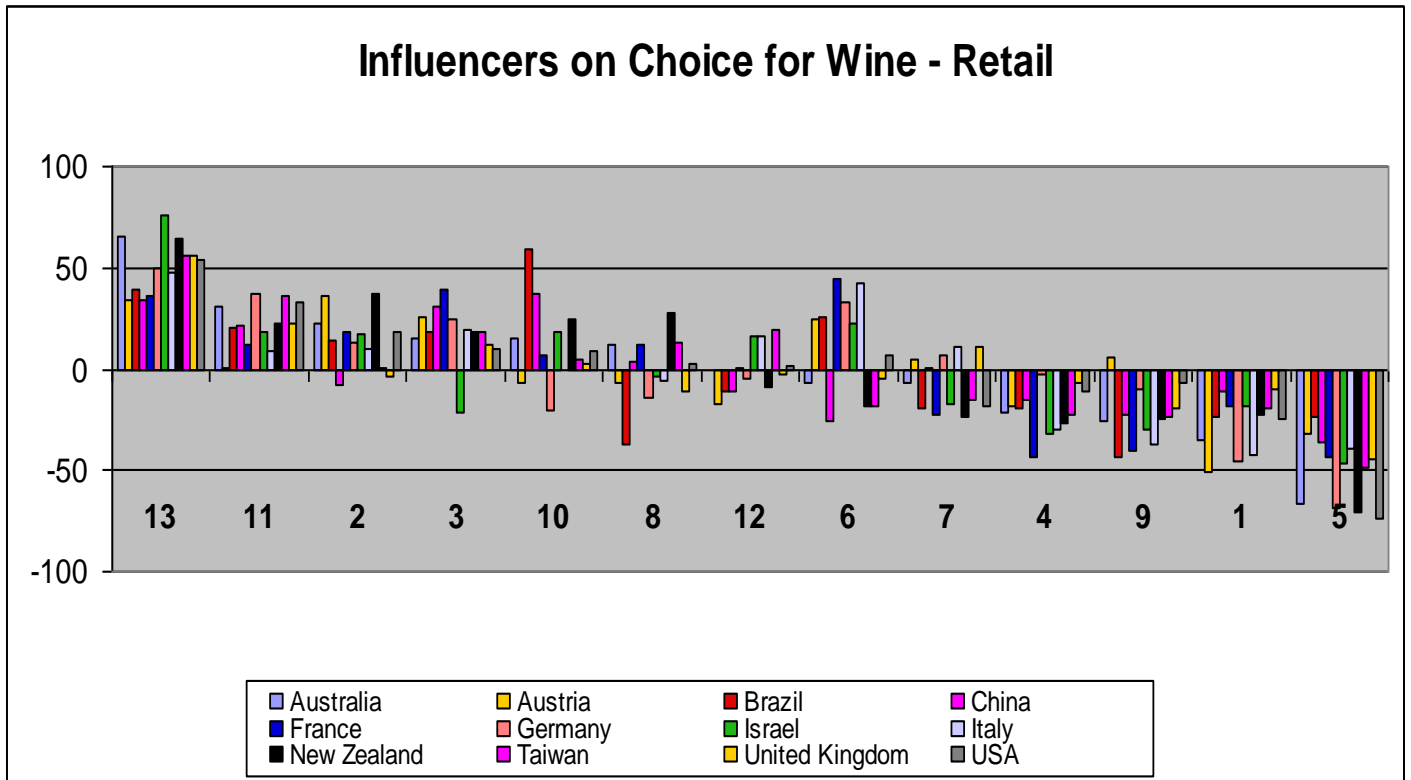
Further research is needed to examine the deeper needs identified in this study, for example, in the UK where back labels are an influencer, what sort of information is actually sought, what weighting of importance is attached to various origins of the wine, what cues are there in various brand names, in fact what is a brand name in the consumer’s mind – high quality tag or high level of awareness?

This research has enabled a large, international collaboration of academic researchers to gather data from their own marketplaces and examine results to compare and contrast. It is hoped that research such as this in the Academy of Wine Business Research will enable a better

understanding of the world wine business, consumer and business to business settings through approaches such as choice modelling and understanding what influences the decisions that are made.

Figure 1 Choice Influencers Market Comparisons – Retail Store

‘What was the influence the last time you purchased a bottle of wine in a store to have with friends for dinner?’



Influencer Legend			
1	Promotional display in-store	6	Matching food
2	Grape variety	7	Information on back label
3	Origin of the wine	8	Medal / award
4	Information on the shelf	9	An attractive front label
5	Alcohol level below 13%	10	Brand name
		11	Someone recommended it
		12	I read about it
		13	Tasted the wine previously

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