

The Culture of Wine Buying in the UK Off-Trade

Author

Dr, Caroline Ritchie
Senior Lecturer
Welsh Department for Hospitality, Tourism and Events Management
Cardiff School of Management
University of Wales Institute, Cardiff (UWIC)
Colchester Avenue
Cardiff
CF23 9XR
UK

Tel: +44(0)29 2041 6424

Email: critchie@uwic.ac.uk

Abstract

The UK wine market is currently one of the largest in the world by value. This is set to continue. It is also one of the few European countries that contradicts general consumption trends by having an increasing rather than decreasing wine consumption profile. Against this background there has been surprisingly little current qualitative research into the motivators of UK wine buying behaviour. This paper addresses this issue by investigating the social and cultural influences which motivate or hinder the buying behaviour of UK wine consumers within off-trade environments.

The results show that the UK is now a mature often, sophisticated, wine market in which wine purchase and consumption have become incorporated into lifestyle for most adult consumers. The results also show that the situation and occasion for the purchase and future usage has a significant influence upon purchase outlet and the gender of the purchaser. The impulse to purchase will be further influenced by whether the intended usage is to be a private one, as in a bottle of wine for informal home consumption, or public, as in the purchase of wine as a gift. The results confirm that there are significant gender differences in attitude towards the purchase of wine. For instance, more women than men buy wine; many do so as part of the grocery shop and do not consider themselves to buy wine. Many conspire with their male partners enabling them to become the overt providers of wine particularly in public situations. Conversely high involvement female wine consumers are also identified in this study.

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Introduction

Although the UK has a reputation for being heavy drinking nation alcohol consumption is not particularly high in European terms, with France, Germany and Spain all surpassing the UK (Mintel, 2005; Cornibear, 2007). In fact per capita consumption of alcohol has stabilised during the last five years at just over 160 litres per head per annum (adults over 18) (Mintel, 2007). Within this stabilisation, however, there has been and continues to be a significant move away from beer towards wine with over 60.8% of the UK adult population now consuming wine on a regular basis (Key Note Ltd, 2006; Smith and Mitry, 2007). Annual per capita consumption of wine was less than three litres in the 1970's. Current adult per capita consumption is over twenty six litres, having doubled over the last twenty years (NTC Publications, 2000; AC Nielson, 2005).

Wine purchase and consumption started to become democratised in the UK during the 1970's (Jenster and Jenster, 1993) a process greatly enhanced by the pioneering role of supermarkets such as Sainsbury's and Marks and Spencer during the 1980's. In 2005 the UK light wine market was valued at £10.28bn (Key Note Ltd, 2006) and it is estimated to rise to approximately £13.5bn by 2011. In 2006 the off-trade represented 80% of the volume and 65% of the value of all wines sales within the UK (Key Note Ltd, 2006).

In light of the size and significance of the UK to the world wine market it is surprising that there is very little qualitative research into the UK wine consumer. Much that does exist relies unquestioningly upon the work of early researchers such as Mitchell and Greatorex (1989) and Spawton (1991) (Egan and Bell, 2002; Demossier, 2004; Johnson and Bruwer, 2004; Barber *et al*, 2007). This early work utilised a marketing perspective in regard to wine retailing and was very much concerned with the purchasing behaviour *per se* of the consumer rather than what motivated that purchase, the *why* question (Thomas and Pickering, 2005). This method of analysing 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). 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.

(Bruwer *et al* 2002, p. 221)

Most research suggests that it is psychologically easier to buy wine in an off-trade situation rather than in an on-trade environment. This is partly because of the public nature of the on-trade environment, partly because of the greater financial risk and partly due to perceived loss of control (Hall *et al*, 2001; Olsen *et al*, 2003). However there is also a reiterative theme commonly utilised amongst many academics and the wine trade that wine buying in the off-trade is still a fearful business for many groups of people, particularly those who know little about wine. This viewpoint suggests that most consumers need a significant amount of reassurance to buy; that they use price and / or familiarity as the major cue to purchase (Quester and Smart, 1996; Batt

and Dean, 2000) and can be encouraged to trade up via the reassurance of the brand. Conversely in the Vinexpo Studies (2003)

*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)

AC Nielsen (2005, p123) shows that the top five brands have only 34% of the total UK off-trade market. This is a tiny percentage in the Fast Moving Consumer Good (FMCG) market when a single market leader usually has 30% - 60% of the total market in other FMCG categories. Hibberd (2003) points out that large wine production companies often maintain 'their' share of the wine market by utilising economies of scope, reflecting the agricultural nature and flexible production techniques of the wine trade. This enables them to produce both mass brands at the entry point and 'unique' products for more involved consumers. The tacit commercial value of this business strategy is reflected in work of Johnson and Bruwer (2004) who discuss purchasing 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 introduces one of the major paradoxes acknowledged by 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)

As a trading nation UK has a long history of interaction with wine for commercial and consumption purposes. Lack of production meant that wine was traditionally perceived as a drink for the socially elite, rather than locally / nationally brewed beer which was the drink for the masses (Barr, 1995). UK consumers aged over 60 may well remember a time when wine was difficult and expensive to buy and consumed only on formal consumption occasions. However UK consumers aged under 50 are unlikely to remember a time when wine *per se* was not as freely available in supermarkets and other retail outlets as shampoo, for example. In a similar way to Hall and Lockshin (1999) Ritchie (2007) shows wine is now incorporated into the UK lifestyle across most adult social groups; in many instances people are as likely to 'open a bottle (of wine)' as to 'put the kettle on' as part of the welcome offering across a range of informal social situations.

Concurring with Olsen and Thach (2001), Charters (2002), Thomas and Pickering (2003) and Olsen *et al* (2003) this paper takes the view that any study of wine consumer behaviour should include a social, cultural behavioural perspective rather than just the marketing perspective still most commonly utilised (Arnold, 2007a). This paper also takes the view that the UK is now a mature wine buying market not the immature one often referred to. As such it displays a wide range of wine buying behaviours. The aim of this paper, therefore, is to develop our understanding of current UK wine buying behaviour in the off-trade across a range of situations. The paper will review relevant literature, specifically in the areas of cultural influences, physical

appearance and gender differences in relation to the purchase and consumption of wine. It will then describe the methods used, and the rationale behind the methods, for the data collection. The themes identified via the data collection and analysis will then be presented and discussed. The paper will conclude by illustrating the significant influencers of differing purchasing behaviour in the UK off-trade and making recommendations for further research.

Cultural Influences upon Wine Purchase and Consumption

Arnold (2007a) suggests that, in particular, wine consumers from non-wine growing countries tend to explicitly learn the rituals of wine consumption from peers and literature. Once any ritualistic behaviour becomes incorporated into the lifestyle of any social group it is usually passed onto the next generation, becoming an accepted behavioural norm, (Bourdieu, 1977: Beardsworth and Keil, 1997: Rozin and Rozin, 2005). Ferguson (2000) and Smith and Mistry (2007) suggest that culinary, food and drink, consumption reflects national and international cultural identities. Olsen and Thach (2001) suggest that national culture influences interaction with wine.

Bourdieu (1977), in his description of culture, used the idea of fine wine as well as art and literature to illustrate behaviours which demonstrate culture or, more particularly, the cultural code that attaches a symbolic value to the cultural practice of each social group. Bourdieu's definitions of capital can be applied to the current UK wine market. Wine usually has a zero use value in relation to 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 economic and cultural value as an historical object). However if that rare / limited production 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. Groves *et al* (2000) via their adaptation of Holt's taxonomy of consumption practices show how the purchase, gifting or discussion of any wine can demonstrate some or all of these attributes within different social structures.

As well as Bourdieu (1977) Fretter (1971) and Amerine and Roessler (1976) also considered fine wine as a high art form. In current terms, for those seeking to acquire an exclusive culture, wine may 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. It may be that wine like cheese, (Christy and Norris, 1999), is being used by some consumers as a way of expressing inclusive and exclusive behaviours. Christy and Norris (1999) show that cheese has many similarities to wine as a consumer good. 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) research into wine consumer interaction reinforces Christy and Norris's views and shows how important the proactive aspect of discovery and reflecting upon that discovery is to this cultural viewpoint. Their work suggests that for some social groups 'risk' is perceived as part of the game of

discovery. It is the discovery, the route to discovery which is key to their behaviour, which is an extrovert, confident participative culture. It is not the introverted one of risk avoidance highlighted by earlier writers (Mitchell and Greatorex, 1989; Spawton 1991) when general wine consumption in the UK was in its infancy.

Savage *et al* (1992) 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. The notion that wine usage is moving away from its elitist rituals amongst some groups as familiarity increases is supported by Bruwer *et al* (2002) and Olsen *et al* (2003). They identify that there are groups of consumers who '*may not necessarily know a lot about wine, but are not worried about the consequences of poor selection*' (Olsen *et al*, 2003). Gibb (2007) identifies new images and rituals that are currently developing within the public consumption of wine. For example the method of opening the bottle, corkscrew rituals versus screw cap twist, can signify significant images about the occasion and or user. Seymour's (2004, p. 14,) 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 class habitus when in private*', again suggesting that wine is utilised in more than one way within differing social groups.

Lester (1999), Hall and Lockshin (1999), Olsen and Thach (2001), Olsen *et al* (2003) and Ritchie (2007) all suggest that both wine purchase and wine consumption is significantly influenced by the occasion and situation of purchase and consumption. They further suggest that since behaviour is dependent upon the situation consumers behave differently in different environments and upon different occasions. Taken together this research questions the value of much research based solely upon demographic data and market segmentation. This point is reinforced by Arnold's (2007b) contention that the less glamorous but significant and increasing over 50's market in the UK is rarely identified as a positive market segment. Yet it is this group who are likely to be familiarising future consumers into the wine experience (Rozin and Rozin, 2005) as well as being significant consumers in their own right.

Labels / Bottle Appearance as an Incentive to Purchase

It is generally accepted that the label / the appearance of the bottle can have an impact upon whether or not the consumer picks a particular bottle out from the shelf of wines. However, research by Batt and Dean (2000), Mintel, Halstead (2002), Wine Intelligence (2002) and Rocchi and Stefani (2006) shows that consumers themselves are unable to identify exactly what makes a good label, although there is 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), Lechmere (2005) and Barber *et al* (2007) 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. 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. Within the off-trade there has been a move to reduce costs by moving to lighter weight glass bottles which has been accepted positively by the public, if they notice. (WRAP, 2007). However the move towards PET bottles, as in Wolf Blass's Green Label range, may re-introduce discordance in some groups of consumers because of the natural –

organic image that most wine producers use to market their products (Pugh and Fletcher, 2002) versus the use of inorganic plastic.

Olsen *et al* (2003), Lechmere (2005) and Barber *et al* (2007) 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? The worry is not so much about the wine and its appearance *per se*; it is more about the impression it will give in that particular circumstance (Hall and Lockshin, 1999). Label and appearance become less significant as the wine consumer becomes more knowledgeable and confident and as the occasion becomes more informal and familiar. Whilst writers such as Lockshin (2004) have recommended physical techniques, such as choosing a pronounceable name or using colours with positive connotations etc., the cultural, emotional and financial state of the consumer at the moment of purchase will finally dictate both actual purchase and emotional involvement with that purchase.

Gender Differences in Wine Buying

Purchase and consumption are affected by the level of involvement with an object and gender studies such as that of Savage *et al* (2001) show that not only do the different fractions of social groups 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 often seen as a leisure activity by men whilst for women it is a mandatory functional task. ACNielsen (2005) shows that well over 60% of wine by value bought in the off trade is bought in the multiple groceries.

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 (2003) study there was a slightly higher response rate from men than women overall, 53% against 47%, but 70% of their mailing list respondents were men. This agrees with Vinexpo (2001) in suggesting that

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

(Williams 2003, p. 10)

Ritchie (2007) shows that there are various public purchasing and consumption situations in which women deliberately abdicate responsibility for wine purchasing. All of this research confirms that there are different, as yet unidentified, stimuli for men and women to purchase and perhaps consume wine which are situation and occasion dependant.

Methodology

As previously stated this research project took the unique (in wine research terms) view that consumers do not act in isolation from their environment and therefore are influenced by other stakeholders who share that space. Four stakeholder groups were identified: trade wine buyers (who buy wine for sale in retail outlets); wine journalists (who raise or create public awareness about products and services); wine producers (who invest in specialist market research and product development) and wine consumers.

Taking a grounded theory approach (Locke, 2001), a series of one to one in-depth semi-structured interviews were held with representatives of the first three stakeholder groups in order to develop a question schedule for a series of wine consumer focus groups. The themes for the first stakeholder group, the trade wine buyers, were developed via a modified Delphi method (Ritchie, 2006). All of the interviews were recorded. The data from this group was analysed and utilised to inform the data collection for the next group etc. All the data from this initial phase of research was then re-analysed and themes for the second, main, phase of the study were developed in a similar way to de Certeau's (1986, p.146) creation of a '*stockpile of knowledge*'. The questions which were developed from these interviews covered alcoholic beverage preferences; who in the household buys wine; where and when wine is bought; the influence of staff in retail outlets; the influence of advertising/ wine media; the image of wine and wine consumers; social and situational factors influencing wine purchases and consumption (mood, context, etc).

The number and structure of the focus groups was developed from age groups, gender consumption statistics (Wine Intelligence, Key Note Ltd and Mintel) and specialist behaviour identified by the trade wine buyers, (see table 1.). The wine producers and wine journalists had not identified specific age groups concentrating on gender and behavioural themes.

Table 1: Development of UK Wine Consumer Focus Groups

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

As shown in table one there was a strong correlation across most of the age groups although other groups were developed specifically for this research project. 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 it was unlikely that any

significant results would be obtained. Conversely if the trade wine buyers groupings were adhered to too rigidly, i.e. only the four groups identified, then bias would be introduced: buying and consumption patterns between 50-year old and the 70-year old consumers are very different for a significant number of fast moving consumer goods; wine consumption peaks in the 45 to 54-year age group (Key Note Ltd, 2004; Mintel, 2007).

The sixth consumer focus group was designed specifically to identify the behaviour of perceived experts - 'wine buffs'. All of the interviewees in the other stakeholder groups had identified that this small, but potentially very influential, group existed although they did not agree on identifying behaviour/s. 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 since they all had a proactive relationship with wine. Conventional snowballing techniques (d'Cruz and Jones 2004) were used to set up the other five focus groups. The only criteria for participants was that they should be in particular age groups, consume wine and that a representative gender balance be maintained across the sample.

As table 2 shows both FG3 and FG4 ran across the 35 – 44 and 45 - 54 age groups. This was because the link person between the other focus group participants and the moderator (the author) was in a partnership with a person in the other age group. This reflected the status of most of their social circle and the link person did not want to exclude partners. After several attempts to establish focus groups separately within each age band it was agreed that that half of the participants in FG3 and FG4 would be from one age group and half from the other. This pragmatic decision ensured that there was accurate representation of each age group overall and reflected the real social situation of both groups of people (Patton, 2002; Barbour and Schostak, 2005) although this is not acknowledged in current quantitative research.

Table 2: Summary of the Demographic Profile of the Consumer Focus Groups

Group Name	Age	Number of Participants	Gender	Partnership Status
FG1	18 – 24	6	All male	All single
FG2	25 – 34	7	All female	3 in partnerships 4 single
FG3	35 – 44	8	3 male 5 female	7 in partnerships 1 single (F)
FG4	45 – 54	8	4 male 4 female	All in partnerships
FG5	55 +	8	4 male 4 female	7 in partnerships 1 single(F)
FG6	Experts 35 - 59	6	3 male 3 female	1 in partnership 5 single (2 F, 3M)

The link person had been asked to facilitate equal male and female participation in all focus groups. However two participants, both female, cancelled out of FG1 at the last minute and were

replaced with other friends, both male. This was not discovered until the participants arrived for the focus group meeting. The focus group was run. Whilst reflecting upon the implications of potential gender bias being introduced into the research the link for FG2 decided her office would be her preferred venue. However if FG2 was to be held in the office venue then all the participants would be female as that was the gender of staff in the 24 - 35 age banding. Another focus group in London had previously been cancelled because travel problems and work commitments on the day prevented most participants' attendance. It was decided to run FG2 with only female participants. Positively it restored gender balance overall and reflected the real social situation. The single sex nature of FG1 and 2 may also have removed some of the tensions which can be present in young or inexperienced mixed gender groups when image and self presentation are being discussed. It is acknowledged that some bias may have been introduced into the results but not to a significant level as most gender issues were common to all but the expert group. The final composition of the consumer focus groups is summarised in table 2.

The six focus groups were held in venues across the south of the UK as this is where most wine consumption takes place (Key Note Ltd, 2004) between March and April 2005. They took place in venues of the consumers' own choice and at times which suited the group, usually Friday or Saturday evenings at the link persons' home. They incorporated a small blind tasting, a procedure supported by Gibbs (1997) and Charters (2004). The drinking of wine, handling of bottles and study of labels greatly facilitated discussion. Since the participants sat around a table in a familiar wine consumption setting this also reflected real life as closely as is possible in an overt research situation (Putchu and Potter 2004; Barbour and Schostak, 2005). Each focus group was recorded both on video and dictaphone to aid transcription and analysis. Each focus group was analysed separately. Themes established from each group were then triangulated against the other focus groups and the data from the first study. Each focus group participant also completed a demographic questionnaire in relation to their off-trade buying habits. The results of the demographic questionnaires were analysed using STATA.

One area of bias may have been introduced into the research. The criteria for participation was wine consumption, age and gender. Normal snowballing techniques were used to recruit participants. However analysis of the demographic data showed that there was a dominance of AB participants, 55% of whom had an annual household income of over £60,000 in contrast to the actual UK average of approximately £40,000 per annum. There was no obvious reason for this to occur since income and occupation were not considered relevant to the study. Research (Vinexpo, 2003) suggests that those who are most involved with wine are AB consumers. The results of this study may suggest that the consumer profile of the focus groups reflects the fact that other socio-economic groups with lower involvement would not want to 'waste' time discussing wine, particularly those for whom wine consumption is a public not private consumption habit (Demossier, 2004). However it could also indicate that for certain (particularly) male groups the public demonstration of wine knowledge is an important social identifier and that, as Bourdieu suggested, inclusion in the focus groups was seen to be indicative of social standing. As discussed the focus groups had been very easy to set up once a suitable link person had been identified, the difficulty had been keeping them small.

Results

There was a general agreement that there is a synergy between food and wine and that wine was the beverage of choice with meals both in and out of the home. Wine was also seen as the gift of

choice when invited to parties and dinner parties as well as being used as a gift *per se* by all but FG1, the youngest focus group. FG1 participants consumed wine but bought very little. They were happy to drink wine in familiar private settings but preferred someone else to buy the wine, usually their fathers, as they '*would know more*'. However every member of this (all male) group believed very strongly that they would '*grow*' into wine and that it would become a proactive part of their lifestyle in the foreseeable future. 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. 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 wine rituals observed on previous occasions by senior colleagues. It may be why men tend to demonstrate more confidence in the public purchase of wine (Vinexpo, 2001: Wine Intelligence, 2002: Williams, 2003) even when they are not particularly interested in wine *per se* as a beverage. In fact the participants in focus groups 2, 3, 4 and 6 suggested that since wine can be used '*as another accolade to who you are*' it was possible to identify a '*macho*' social group who publicly bought, discussed and perhaps consumed expensive wines when '*they weren't even interested in the wine itself*'. This particular interaction with wine was being explicitly used to demonstrate exclusive, elitist behaviour. The focus group participants identified these wine consumers as wine bores rather than buffs. This suggests that whilst interaction with wine has become necessary to demonstrate inclusive behaviors in certain social groups, it remains culturally exclusive in other forms.

Further gendered interaction with wine was suggested when many of the female focus group participants discussed behaviours demonstrating their complicity in allowing their male partners to take the overt role of wine buyer in all public purchase situations (Ritchie, 2006). Only the highly involved wine consumers felt confident enough to move away from tradition in formal situations unconsciously creating another set of rules (Savage *et al*, 1992) for others less embedded in wine culture to aspire to understand and emulate.

In focus groups 2 to 6 all of the participants agreed that they consumed wine on a regular basis, but some women in each focus group except FG6, the experts, denied buying wine in the off-trade. This contrasted with the results of the demographic questionnaire which showed that only one participant outside FG1 had indicated that they did not buy wine. This participant did not do so because of a visual impairment, not out of choice. These results reflect Vinexpo's findings where 17% of participants said that someone other than themselves bought the wine in their household (Vinexpo, 2001, p16). However further questioning during the focus groups established that in all except two cases the women did actually buy wine; often a significant amount of the family total. As it was part of the grocery shop and for informal household usage or when '*friends drop by*' it was not considered to be a memorable purchase. These women who said that they were not buying wine estimated that their usual per bottle price was around £5.00, going up for special occasions. This does not reflect back on the UK average bottle price of around £4.00 (Key Note Ltd, 2006). It is more likely that these women were describing a price which they felt to be an acceptable one to represent themselves to others. Following on from Cockburn-Wooten's (2002) work it would also suggest that, at the time of purchase, wine buying is often so mundane and functional that it deserves little thought or involvement. Williams (2003, p11) suggested that '*62% of buyers will take no longer than a minute to find what they want*'. This would agree with the behaviour identified by Olsen *et al* (2003) and Williams (2003) that buying for the home is a quick low risk, low involvement activity.

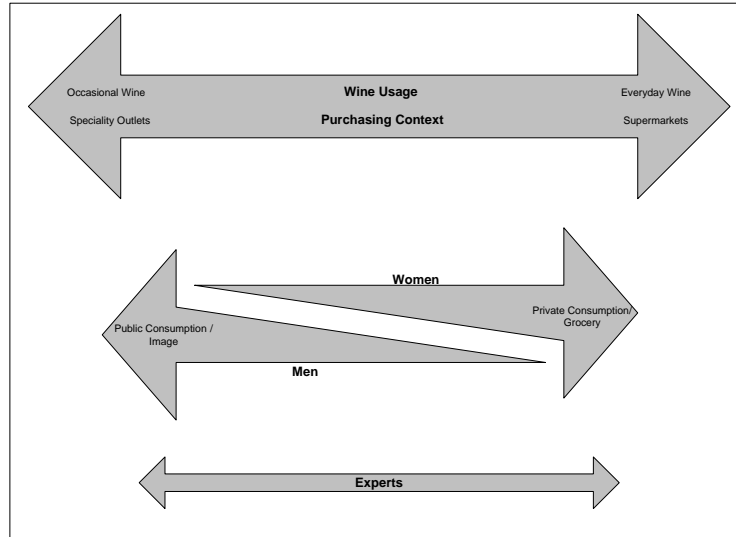
Those trade wine buyers whose companies had participated in qualitative market research suggested that women buying wine at the end of the grocery shop view wine as an overt positive purchase activity. Conventionally in the UK the wine aisles are placed as the final shopping section. This paper suggests that it is just as likely that the women view the wine aisles positively because they signify the end of the grocery shop and an adult purchase area. 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 spoil themselves, i.e. chocolate or shoes; as one female participant explained [the activity of] *'buying the wine for itself does nothing for me whatsoever'*. Conversely many of the male members of the consumer groups used buying wine as a way of pampering themselves as well as consuming it; *'you can't beat popping into Berry Brothers and having a little snifty around there'*. Quester and Smart (1996), Thomas and Pickering (2003) Hoffman (2004) and Mitchell and Hall (2004) all suggested that men buy more wine in places other than supermarkets although women are the main wine purchasers in the household. This gender related wine buying behaviour was indicated in the quantitative data analysis for this study, but it also seemed to be linked to having young children living at home. Perhaps, because of the wide range of wine prices available, wine may be seen by men as an affordable and public luxury during a lifestage when frivolous disposable income is likely to be restricted. The quantitative data analysis also indicated that single people are more likely to buy in places other than supermarkets. However as most of the single people were either in FG1, who did not buy wine, or in FG6, the expert group, this may actually indicate that the female wine experts were buying in the same confident way as men rather than utilizing the low purchase involvement techniques demonstrated by other female participants.

All participants, men and women, felt that wine for a special purchase should not be bought with the grocery shopping. It should require care and thought to equate to the occasion for which it was being purchased. They would prefer to buy from a specialist wine merchants, chain or independent. However they also said that the wine merchants was likely to be local and one that they shopped in regularly so that they had built up a rapport and trust with the owner. This activity is reflected in the current success of independent wine merchants in the UK whose average sale price is significantly above that of the supermarkets.

Outside the expert group only one participant admitted that they regularly bought wine in the £3 - £4.00 range. As previous research suggested FG6 (the experts) would alter their buying price in accordance with a multitude of cues according to the situation in which the wine was to be consumed. Their minimum purchase price was about £2.50 for wines on offer. A maximum price was not established. Ritchie (2006) shows that most of the wine trade buyers were very well aware that there is a category of wine consumers, 'wine junkies', who buy at the lowest price points because wine at that price is a cheap and alcoholic beverage. The trade wine buyers thought it unlikely that most of these consumers would ever become involved with wine or seek to trade up.

These results show that behaviour and involvement with wine is blurred. The same consumer can have low involvement in one situation but can be highly motivated and proactive upon other occasions, although as figure 1 illustrates behavioural tendencies in particular groups can be identified. UK wine consumer behaviour is situation and occasion dependant and particularly motivated by whether the purchase and consumption is to be public or private.

Figure 1: Behavioural tendencies in wine purchase contexts for UK wine consumers.



Conclusion

The numbers involved in the focus groups were quite small, so are not able to be considered as statistically representative of the UK market as whole. The results of the quantitative data analysis give a broad brush overview of wine buying behavioural trends but specifically confirms that even a population sample of this size is affected by many varied influences. This suggests that it is impossible to objectively classify the UK wine buying public into neat market segments. Despite this, several issues are raised by analysis of the quantitative and qualitative data all of which impact upon wine purchasing behaviour in the UK off-trade and all of which would benefit from further research.

As figure 1 shows, there is significant difference in buying behaviours between genders. Women appear to be particularly involved in not-wine shopping where purchase is a functional part of the grocery shop. Since this is not seen as a valuable or public purchase price, immediate local visual cues and ease are the most significant drivers, all other marketing is irrelevant. When wine purchase is significant either because it is for a gift or because of the occasion (either way 'others' will have the potential to view the bottle and make judgements about the purchaser) then more purchasing is done by men and from specialist outlets. These may be specialist off-licences or they may be via the internet, mail order or winery. Men in partnerships purchase less than women because they do not participate in the grocery shop as often as women. However men are much more likely to be high or moderately involved wine purchasers when the wine is for a public occasion.

The male participants did not talk about a particular buying price for wine perhaps because they tended to buy with a particular occasion in mind. However they did confirm both overtly and covertly that wine knowledge was an integral and necessary part of their social construct. Had the participants come from other socio economic groupings this result may well have been different although Demossier's (2004) work would indicate that this is not necessarily so. The interrelationship between wine knowledge as part of social and business image and wine as a beverage of preference would undoubtedly benefit from further study.

Several different types of male wine buyers, or occasions when men become overtly involved in buying wine, have been identified in this paper. Most discussion about female wine buyers has been about low involvement consumers and yet half the participants in the expert group were female. This raises the question as to how some women change from having a low informal social interaction with wine, to having a highly sophisticated one in which they control the purchase situation. It could have been a function of being single at the time and having to buy wine. Choosing to become involved enough to become a committee member for a wine tasting circle suggests that there are likely to be other, as yet unidentified, influences.

This study, via the trade wine buyer study and the consumer focus groups also identifies two groups of disinterested wine consumers for whom price and time/ functionality are likely to be the main purchasing influencer; the disinterested wine junkie and the bustling female grocery shopper. Neither are likely to be significantly influenced by traditional marketing campaigns of either the naturalistic (Spawton, 1991; Pugh and Fletcher, 2002) or funky style because these consumers won't recall and utilise that information when purchasing (Vinexpo, 2001). In particular, female shoppers in grocery shopping mode are not going to trade outside the household budget, although they may in other purchase situations. These results, therefore, query the effectiveness of much research activity which is aimed at developing marketing strategies to encourage entry point and low involvement wine consumers to trade up. Instead the results suggest that further research is needed to identify whether or not triggers to trade up actually exist in these two groups of wine consumers.

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