Marketing by What Matters: Using Schwartz's Theory of Basic Values to Identify Wine Consumer Segments

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Abstract:

Purpose - The primary aim of this research study is to explore the use of individual values as a means to segment the US wine market. They study employs Schwartz's Theory of Basic Values. Market segments based on values are created and wine consumer behaviors amongst value groups are explored.

Design/methodology/approach - An online survey was used to collect data from panel members in the US. Quantitative analyses were used to explore the relationship between respondents' values and their preferred wine behaviors.

Findings - The statistical findings validate the use of the Schwartz value structure to represent the US marketplace. Four motivational groups reflecting values of self-enhancement, conservation, self-transcendence and openness to change were identified.

Keywords - personal values, market segmentation, consumer behavior, wine attributes

1. INTRODUCTION

The market for wine in the United States has grown steadily over the last decade to become the largest in the world (De La Hamaide, 2014). As wine has become more popular, its appeal has expanded to new regions and to different demographic and lifestyle groups. The result of these changes is now the consumer market has become more diverse and selling wine in the US more complex than ever. Creating effective marketing programs requires a deep understanding of how consumers differ and how to best tailor market programs to distinct market segments (Barrena and Sanchez, 2009; Thach and Olsen, 2006). Market segmentation studies address this important endeavor.

With more than two decades of research, studies on market segmentation within the wine industry are not new and early studies identified a range of variables for consideration, including demographics (Sanchez and Gil, 1997), benefits sought (Hall et al., 1994) lifestyles (Bruwer et al., 2001), and occasions (Dubow, 1992). Although different segmentation approaches have been advanced, strong support for using those based on socio-demographic variables to explain wine preferences and consumption has yet to materialize (Fulconis and Viviani, 2006; Magistris et al., 2011; Mueller et al., 2011). Marketing researchers have come to the realization that creating groups based on motivation and behavior is a more productive approach to wine market segmentation (Geraghty and Torres, 2009). From a research perspective, there remains a need to better understand the motivational factors that drive behaviors exhibited around wine consumption.

Values explain the motivational basis of attitudes and behaviors (Schwartz, 2011). Marketing scholars have proposed including values as a method of market segmentation. For example, Kotler states, "the advantage of using values go deeper than attitudes and behaviors and can serve to explain behavior over the long term" (2000, p. 267). Values are also important to marketers because they can be used as a basis for advertising and communication strategies (Tóth and Totth, 2003).

This study explores the question of whether the four value segments identified by Schwartz affect wine consumption. A literature review conducted for this study suggests the answer is yes and the impact can be seen in a wide variety of wine related behaviors.

2. LITERATURE REVIEW

2.1 Schwartz's Theory of Values

Schwartz's theory of values proposes ten different universal values and then determines how these values relate to each other (Table 1). Next, these 10 values can be arranged to provide a continuum of related motivations. The values are aligned with the other values with which they are most congruent and away from those that are most likely to cause conflict. By grouping values that are contiguous to each other, Schwartz has identified 4 motivational groups. The groups are 1) Openness to change, 2) Self-enhancement, 3) Conservation, and 4) Self-transcendence.

Table 1. Schwartz Basic Values and Goals

Values	1	Goals Expressed by the Value
1.	Self Direction	Independent thoughts and actions, freedom, creativity,
2.	Stimulation	Excitement, variety, and novelty
3.	Hedonism	Pleasure, fun and self-gratification
4.	Achievement	Personal success through demonstrating competence
5.	Power	Social status, prestige, wealth, control and dominance
6.	Security	Safety, harmony and stability
7.	Conformity	Self-restraint, obedience, self-discipline
8.	Tradition	Respect and acceptance of cultural and religious traditions
9.	Benevolence,	Enhancing the welfare of others with whom one affiliates
10.	Universalism	Protection of people and nature, sustainability

- 1. Self-enhancement: This segment has motivations most associated with Self-enhancement and members desire Hedonism and are most likely to find satisfaction from Achievement and Power. They not only want to be competent, they want the recognition from others for their abilities. The rewards of their success, such as wealth, prestige, and status are powerful motivators for this group. They also seek the power and domination that comes from their mastery of skills. The values held by people in this group are most congruent with those associated with Openness to change, especially in terms of their shared value of hedonism, and also with the Conservation segments' desire for power. People in the Self-enhancement group may find their motivations most often in conflict with the benevolence and universalism values held by the Self-transcendence group.
- **2. Conservation:** The broad motivational goal of the Conservation segment incorporates the values of Security, Conformity and Tradition. A person with strong Conservation goals seeks personal safety, order and harmony in relationships, and feels that preserving existing cultural and religious traditions give certainty to life. A person in this group feels this is accomplished through subordination of one's own selfish desires. The values of Power and Benevolence are most congruent for this segment as they may wish to use power to control others in order to promote harmony, or desire benevolence as a way to foster close relationships. Values associated with Openness to change, such as Stimulation and Self Direction, are most likely to create conflict within people in this segment.
- **3. Self-transcendence:** This segment of the continuum refers to strong values of Universalism and Benevolence. This segment is composed of values associated with the welfare of others, both those that one closely associates with as well humanity in general. They value tolerance and understanding as well as equality and a world at peace. Their values expand to protection of nature and the environment. The values most congruent for members of this group would be Self Direction with its tolerance for diversity, and Benevolence with the belief in devotion and maintaining close relationship to members of one's group. The values most likely to cause conflict are those of Power and Achievement associated with Self-enhancement.
- **4. Openness to change:** This motivational segment possesses strong motivations associated with Self Direction, Stimulations and Hedonism. Therefore, one would expect

people who are driven by Openness to change to strive for novelty and mastery in their lives with a strong desire for affective pleasurable arousal. The values associated with Self-transcendence and Self-enhancement would be congruent to these motivations, but those associated with Conservation may lead to internal conflict.

2.2 Values and Wine Consumption

Spawton (1991) was one of the first scholars to propose incorporating values into wine market segmentation. Values have been shown to vary across countries and wine consumption reflects the prevailing culture of the society in which people live (Hall et al., 1994). In a French context, personal values have been used to explain whether consumers drink wine and to what extent (d'Hauteville, 2003). They have been employed to better understand wine market segments based on consumers' preferred attributes and orientation to wine (Hall, 1999, Hall and Winchester, 2000).

Several studies employing Means-End Chain methodology, or laddering, show that values can have a significant influence on the selection of wine on different occasions (Hall et al, 2001; Oppenheim et al, 2001; Cavicchi et al, 2008). Values, especially those related to sociality, may influence wine consumption compared to other alcoholic beverages in different consumption situations in Italy (Agnoli, et al., 2011). Personal values influence the entire decision making process for selecting a wine in Hungary (Tóth and Totth, 2003). Personal values have also been shown to relate to wine tourism behavior as well as wine consumption (Simpson, et al., 2004).

In a review of multiple studies focused on wine and values, several key behaviors have been identified: wine involvement, subjective wine knowledge, wine tourism, wine innovativeness, preference for organic wines, and information search (friends and online). For purposes of brevity, the studies have been summarized in Table 2.

Table 2. Synopsis of Research Implicating Values

Wine Behavior	Wine Studies	Values		
1. Wine Involvement	d'Hauteville, 2003; Hirche and Bruwer, 2014;	Hedonism, Security,		
	Geraghty and Torres, 2009;	Pleasure, Power, Enjoyment,		
	Lesschaeve and Bruwer, 2010; Ogbeide and	Self-enhancement		
	Bruwer, 2013; Spawton, 1991; Hall et al, 2001;			
	Oppenheim et al, 2001; Cavicchi et al, 2008			
2. Subjective Wine	Philippe and Ngobo, 1999;	Self-direction, Achievement		
Knowledge				
3. Wine Tourism	Bruwer and Alant, 2009; Charters and Ali-	Stimulation, Power,		
	Knight, 2002; Hall, 1996; Mitchell and Hall,	Hedonism, Self-direction,		
	2006; Olsen 2009; Simpson et al., 2004.	Benevolence		
4. Wine Innovativeness	Goldsmith, 2000; Mueller et al., 2011; Olsen et	Self-direction, Stimulation		
	al., 2014	Hedonism, Power, Security		
5. Prefers Organic Wine	Fotopoulos et al., 2003; Mueller et al., 2011;	Hedonism, Conformity,		
	Olsen et al., 2012	Universalism		
6. Global Orientation	Magistris et al., 2011, Mueller et al., 2011	Tradition, Stimulation,		
		Conformity		
7. Information Search	Fulconis and Viviani, 2006	Hedonism, Achievement,		
	Tóth and Totth, 2003	Conformity,		

The research questions addressed in this study are whether the pattern of values identified by Schwartz's Theory of Basic Values can be replicated within the population of US wine drinkers, and if so, how does a person's value orientation relate to important areas of wine consumption? This exploratory study does not propose directional hypotheses at this point, but it does anticipate group differences. Hypothesis 1 relates to whether our sample is able to replicate Schwartz's Theory of Basic Values. Hypotheses 2-9 are related to the values held by the 4 segments and aspects of wine consumption behavior.

- H1: Four value segments of the US wine drinking population can be identified similar to the 4 value orientations identified in Schwartz's Theory of Basic Values.
- H2: Differences in the means for levels of wine involvement exist among the 4 value segments.
- H3: Differences in the means for subjective wine knowledge exist among the 4 value segments.
- H4: Differences in the means for enjoyment of wine tourism exist among the 4 value segments.
- H5: Differences in the means for degree of wine innovativeness exist among the 4 value segments.
- H6: Differences in the means for consumers' global wine orientation exist among the 4 value segments.
- H7: Differences in the means for consumers' preference for organic wine exist among the 4 value segments.
- H8: Differences in the means for consumers' likelihood to consult friends about wine purchases exist among the 4 value segments.
- H9: Differences in the means for consumers' likelihood to consult online sources about wine exist among the 4 value segments.

3. METHODOLOGY AND RESULTS

Data were obtained from an online study conducted in 2014 of respondents from the United States. The sample consisted of 977 usable surveys from respondents from all 50 states. Survey Monkey was used to create and administer the survey, and respondents were obtained from a panel data provider, Survey Sampling International. To participate in the study, respondents were screened to be over 21 and at least occasional drinkers of wine.

Measures for values and wine related behaviors were adapted from previous research and Likert type scales (6 point for values, 5 point for wine related behaviors) were used to indicate agreement or disagreement with items on the questionnaire (see Table 3 and 4). The research first determined whether the data reflected the value structure identified by

Schwartz. Cluster analysis, using the 10 universal values was done to create a four-segment solution. To remove possible response bias the analysis used within-line standardization.

A four-group solution was identified that approximated the 4 domains proposed by Schwartz, 1) Self-enhancement, 2) Conservation, 3), Self-transcendence, and 4) Openness to change. ANOVA was used to describe membership in each of the 4 groups using the 10 values measured in the study. A lower mean score indicates greater agreement with the measure. Significance at the .05 level is indicated by an asterisk. Duncan's Post hoc test was employed to determine which groups significantly differed from others. The F-test indicates whether there is a significant difference to be found in the means, but with more than 2 groups, it is not possible to tell from the ANOVA alone whether it is group 1 mean that differs from the mean for group 2, 3 and 4, or whether it is group 2, 3 or 4 whose mean differs, or whether all 4 groups means are significantly different from each other. (See Table 3.)

Table 3. ANOVA for 4 Value Motivational Groups

. SE V=411	2. C N=214	3. ST N=139	4. OC N=213	F	SIGNIFICANT GROUPS - Duncan's Post hoc Test
. (0	2.24	2.52	2.17	22.46*	4 6 2 1 6 2
69	3.34	2.53	2.17	33.46*	4 from 3, 1, from 2
172	4.12	2.05	2.20	00.77*	1 from 1 2 from 2
7.73	4.13	2.93	2.38	80.77*	4 from 1, 3 from 2
67	2.43	1.68	1 73	60.42*	3, 4 from 2 from 1
07	2.73	1.00	1.75	00.42	3, 4 Hom 2 Hom 1
.56	3.64	3.73	3.04	47.66*	1 from 4 from 3, 2
				.,	
2.81	4.74	5.15	4.18	230.71*	1 from 4 from 3 from
					2
56	2.08	2.41	3.31	40.27*	2 from 3, 1 from 4
60	1.93	2.46	3.63	75.05*	2 from 3, 1 from 4
70	2.07	2.20	2.22	40.00*	2 2 5 2 5 4
/0	2.07	2.28	3.33	40.09*	2, 3 from 2 from 4
73	2.43	1.68	1 73	63 35*	3 from 4, 2, from 1
13	2.43	1.00	1.73	03.33	3 HOIII 4, 2, HOIII 1
.81	2.53	1.86	2.36	24.70*	3 from 4, 2 from 1
					., 2
	.6973	I=411 N=214 .69 3.34 .73 4.13 .67 2.43 .56 3.64 .56 2.08 .60 1.93 .70 2.07 .73 2.43	I=411 N=214 N=139 .69 3.34 2.53 .73 4.13 2.95 .67 2.43 1.68 .56 3.64 3.73 .81 4.74 5.15 .56 2.08 2.41 .60 1.93 2.46 .70 2.07 2.28 .73 2.43 1.68	I=411 N=214 N=139 N=213 .69 3.34 2.53 2.17 .73 4.13 2.95 2.38 .67 2.43 1.68 1.73 .56 3.64 3.73 3.04 .81 4.74 5.15 4.18 .56 2.08 2.41 3.31 .60 1.93 2.46 3.63 .70 2.07 2.28 3.33 .73 2.43 1.68 1.73	I=411 N=214 N=139 N=213 .69 3.34 2.53 2.17 33.46* .73 4.13 2.95 2.38 80.77* .67 2.43 1.68 1.73 60.42* .56 3.64 3.73 3.04 47.66* .81 4.74 5.15 4.18 230.71* .56 2.08 2.41 3.31 40.27* .60 1.93 2.46 3.63 75.05* .70 2.07 2.28 3.33 40.09* .73 2.43 1.68 1.73 63.35*

Next, ANOVA was used to determine if the 4 segments differed in aspects of wine consumer behavior. A significant F statistic determined that the value groups did differ on the 8 different aspects of wine behavior explored in this research. Again, Duncan's Post hoc test was employed to determine which groups significantly differed from others. (See Table 4.)

1 SE 2 C 3 ST 4 OC Significant Groups Wine Involvement* 4.08 3.93 4.03 20.18 2 from 3, 4; from 4, 1 3.63 Subjective Wine Knowledge- novice, 2.28 1.80 1.94 2.15 24.28 2, 3 from 4 from 1 intermediate, advanced, connoisseur Wine Tourism, enjoys visiting 3.85 3.67 3.65 3.92 4 04 3, 2 from 1, 4 wineries in different regions 3.09 3.71 3.78 33.10 2 from 3, 4, 1 Wine Innovativeness, likes new and 3.86 unusual wines Global wine orientation, likes to try 3.95 3.70 4.16 4.10 11.31 2 from 1, 4; from 4, 3 wines from different countries Prefers organic wine 3.53 3.16 3.46 3.53 9.81 2 from 3, 4, 1 Information search, consults friends 2.53 1.65 1.78 2.11 40.86 2, 3 from 4; from 1 Information search, consults online 2.53 1.67 1.99 2.27 34.66 2 from 3 from 4 from 1 sources

Table 4. Value Structures and Wine Consumer Behavior

The results of the analysis demonstrate the four groups are somewhat distinct in terms of their wine consumer behavior. The differences are summarized below.

- 1. Segment motivated by **Self-enhancement**: These wine consumers exhibit motives for having fun, but also want to find personal success through status and prestige. They are relatively high on wine involvement, have the highest subjective wine knowledge, enjoy wine tourism, and show the most wine innovativeness. They are mid-range in global wine orientation. They show slightly more interest in organic wines, and are most likely to consult with outside sources about wine, both with friends and online.
- 2. Segment motivated by **Conservatism**: These wine consumers with more traditional and security based values have the lowest reported scores for the wine related behaviors. Although they drink wine, they are not as heavily involved with the product category and do not feel they are very knowledgeable. This pattern is also reflected in their wine choices. They are not as interested in visiting wine regions, trying new or unusual wines, imported or organic wines. Perhaps due to their lack of interest or curiosity, they are also least likely to consult with friends or online sources about wine.
- 3. Segment motivated by **Self-transcendence**. These wine consumers, with a strong interest in humanity and nature, ranked in the middle on most of the measures of wine-related behavior. The one measure where they are the highest is with having a global orientation and trying wines from different countries. They show some interest in organic wines as do 2 other groups, but they do not have the highest mean on this measure as might be expected given their concern for nature and the environment.
- 4. Segment motivated by **Openness to change**: These wine consumers with their motivations for novelty, stimulation, pleasure and mastery scored high on most measures of wine related behavior. This group of consumers is quite similar to the Self-enhancement segment in most regards. They see themselves as slightly less knowledgeable than members of group 1, perhaps because they are also less likely to consult with friends and online sources about wine.

^{*5} Item Scale, Chronbach's Alpha .89

5. DISCUSSION, LIMITATIONS AND CONCLUSIONS

This study has several implications for wine academics and practitioners alike. In terms of academics, this study supports previous research showing that consumers who are more involved with wine have values associated with Hedonism, Pleasure, Power, Enjoyment, and Novelty (d'Hauteville, 2003; Hirche and Bruwer, 2014; Geraghty and Torres, 2009; Lesschaeve and Bruwer, 2010; Ogbeide and Bruwer, 2013; Spawton, 1991). These types of consumers fall into Schwartz's two segments of Self-enhancement and Openness to change. The study also highlights that US consumers who are the least involved with wine are motivated by Conservatism with a key value of Security.

In terms of practical implications, this study can be useful for wine marketers in targeting distinct promotional messages around these four value groupings. For example, marketers targeting consumers with values for Self-enhancement may want to show advertisements emphasizing people having fun with wine, as well as appearing successful in their careers, and visiting wine tourism regions around the world. Since this segment is savvier regarding technology, they could also use digital marketing to reach this group. Conversely for consumers falling into Schwartz's segment of Conservatism, marketers may want to emphasize traditional values such as using wine in family settings or for special celebrations. Focusing on consistency of taste and style in wine would also be appealing to this group.

In addition, operations of the winery can be adapted to appeal to certain value segments, such as using sustainable winemaking and vineyard practices. While it might be expected that these efforts would appeal to the members of the Self-transcendence group due to their interest in nature and the environment, our research shows that the Openness to change and Self-enhancement group would respond equally well to such positioning.

As the Direct to Consumer portion of sales has become more important to many wineries' profits, it is critical to retain club members over the long run. Creating wine events to appeal to segments based on values can help maintain close customer relationships and encourage repeat business. For example, members of the Self-enhancement group may enjoy more upscale, formal wine events where they can show off the accouterments of their status and success, while members of the Self-transcendence group may find such affairs too ostentatious. Conservation members may enjoy more informal family style events such as picnics and BBQs, while members of the Openness to change group might appreciate events that are more unusual and creative, such as costume parties.

There are several limitations to this study which highlight future areas for research. Though the sample includes wine consumers from all 50 states, it is based on panel data and is therefore not a representative sample. Also the study did not collect detailed information about preferred brands and digital marketed platforms used. For future studies, it would be useful to identify a random sample and add more detailed questions. The study also did not look at the impact of life circumstances, such as age and life cycle stages on a person's values. Schwartz makes a point in his writings that these life circumstances can shape one's values. Future research should consider the interaction of life circumstances and values on

wine consumption behavior. It would also be interesting to conduct this study across countries to identify potential international differences.

In conclusion, the findings of this study suggest that consumers' motivations as derived from their innate value structure do play a role in shaping their wine related behaviors. Schwartz's Theory of Basic Values appears to be one way to incorporate values into scholarly research on wine behavior. Market segmentation studies in the wine industry should continue to use values as a means to provide a richer description of wine consumers.

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