

# Perception Study of Wine Market Culture of an Emerging Market-India- Will it Emerge from Infant to Growth Stage?

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## Abstract

**Purpose:** The purpose of this paper is to find out the consumer perception towards wine in emerging market like India.

**Design/methodology/approach:** This study is based on questionnaire administered to respondents in the city of Nashik, which is the largest producer of wine in India and SARC countries, and Mumbai-the financial capital and mini India due to its population mix in the second phase. Total 280 respondents from both the cities of different age groups participated in this study. 150 are from Mumbai. It is a descriptive study.

**Findings:** There is no wine culture in India. Age groups of 25 to 35 consume wines more compared to others. There is lack of awareness about the various types of wines and their consumption pattern. The most preferred brands are from Australia, Chile followed by France in India.

**Managerial Implications:** This research may help in to develop a framework for consumer- centered planning. Small wineries managers can evolve strategic marketing management based on contemporary developed consumer behavior and country-of-origin effects.

**Originality/Value:** This is the first study to address on consumer perception towards wine in India. Since wine industry is in infancy stage in India, the present study represents an important contribution to understanding the interface between commercial interests and consumer's perception towards wine.

**Keywords:** Consumer perception; Wine; India

## Introduction

International competition in the wine world has become very fierce. Quality has risen on all fronts, and more wine-producing countries have been exporting wine to the world. There is practically no volume market today for low-quality wine. The wine industry is extremely fragmented and has a myriad of brands, which creates a problem in brand recognition and complicates the sales process [1]. Consolidation of the industry has helped to improve margins and increase the sales of the leading wine companies, but it has also increased the number of brands that have to be managed. It is considerably more difficult for a sales team to push different brands into the distribution network [1]. Many wineries are witnessing a slowdown, but this is not true of them all. Strong wineries possess strong brand names, and strong brands will continue to enjoy robust growth. Building a brand is very important in a wine market where the consumer can be overwhelmed by too many choices. By having a strong brand, a company can enjoy better market share. In international markets, the importance of branding in the wine industry is growing. France, Italy and Spain are only a few of the countries that managed to develop strong brands. For a wine brand to gain global market share and sustain its position over time, it must have consistent quality and flavor. However, grapes constitute the key ingredient in wine making, and have a different flavor depending on the area in which they are grown.

## Wine market scene

A global wine label will ultimately require an enormous supply of grapes spread over many regions. Although there is no doubt that country-of-origin image influences and determines consumers' perceptions of a product, and thus has an impact on the purchase decision and the use of a product or service, there is still an insufficiency of methods to reliably measure that influence. This is due to the multidimensional and complexity of the concept of country-

of-origin image and the number of different elements influencing its formation. Some of them are: (1) country-of-origin and countries of production; (2) stereotypes; (3) ethnocentrism; (4) interrelationship between country-of-origin image and other product's attributes; (5) demographic, social and economic factors; (6) changing influence in the course of time [2]. France, Italy and Spain, account for 62 per cent of world's wine production, while the US wine production is only 6 per cent, Australia 2 per cent and Chile 1 per cent.

## Wine market in India

India has a wine market of roughly 1.2 million cases, while experts predict that consumption will grow at a CAGR of around 30% during 2009-2013 [3]. It is likely to touch Rs. 27000 million mark by the end of 2012. Cities like Delhi, Mumbai, Chandigarh, Bangalore, Chennai etc. account for majority of wine consumption in India. Favorable government policies, suitable tax structures, rising disposable income, growth in tourism sector etc. are certain reasons for burgeoning Indian wine market. 65 per cent of the total volume of wine consumed in India is produced locally in states like Maharashtra, Karnataka, Andhra Pradesh, Tamil Nadu, Punjab. India has become a strong contender in the global wine business as wine made in India is vying with the best

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quality wine producers and consumers. The Wine Industry of India is at its introduction stage of its life cycle and a small winery can be started in India with an investment of about \$44,000. Champagne Indage Ltd. was India's largest and oldest wine company, established in 1982. With vineyards spread over 2500 hectares, Champagne Indage has its facilities in Nashik and Narayangaon, with 20 varieties under cultivation and over 137 varieties under plantation. It had its presence across the globe with 10 offices. They have 43% market share in India. This is followed by Sula Wines, Sula has rapidly established itself as India's leading premium wine brand. Sula has expanded from the original 30 acre family estate to about 1500 acres (owned and contracted) under plantation, both in Nashik as well as in nearby Dindori, India's upcoming wine region. In addition to having a wide national distribution network within India, Sula also exports its wine internationally, as well as importing and distributing wine from leading producers worldwide. It has 33% market share [3].

### Need for the study

The aim of this research is to investigate current practices, beliefs and attitudes of wine consumers in India—an emerging market for wine and to identify the factors that affect wine marketing. There is a paucity of research in the field of wine. This research can help the wine producers in the emerging market.

## Literature Review

### Wine branding and culture

In international markets, the importance of branding in the wine industry is growing. France, Italy, USA, Australia and Spain are only a few of the countries that managed to develop strong brands. As a result, consumers see (and drink) more and more wines from the United States, France, Australia, Spain, Chile, Italy, Canada and many other countries. Branding is important, but its effectiveness is dependent on quality. It has to live up to its promise. Wine quality can be improved only if wine makers invest. The research has shown that especially for wine, consumer choice increasingly rests on images, beliefs and associations with frequently strong sociocultural aspects.

Wine products possess pronounced cultural and symbolic characteristic. Marketing of wine - a product that is largely cultural in nature. Wine marketing faces a very peculiar situation today, one where emotion plays a particular role [4]. There appears to be a paucity of empirical research of branding in the wine industry [5]. Countries of origin in branding may influence the wine purchase behavior due to consumer perception.

### The country-of-origin effect

Country of-origin image influences and determines consumers' perceptions of a product, and thus has an impact on the purchase decision and the use of a product or service. country-of-origin label, as one of the extrinsic cues, provides consumers with additional information about product quality [6]. Country-of-origin image is the key factor that influences consumer's perception of a product. The quality of unfamiliar foreign brands is inferred through country image. Positive country-of-origin image can be used as a powerful marketing tool [2]. However, Consumer's evaluation of country-of-origin and production image changes if they use products from a specific country more extensively. Consumer experience plays an important role. Emerging market like India due to globalization are opening up a new market for wines as wine consumption is considered as a habit in upper middle class population.

### Origin image and its influence on wine preferences

Country-of-origin has a significant effect on consumers' evaluation of a varietal wine when it is presented as a cue on the product [7] New Zealand has tended to concentrate on white varieties, such as Sauvignon Blanc. Both Australia and New Zealand are well-established exporters of varietal wines. Chile is a more recent entrant to the export markets for wine. France's position is more complex [7]. wine region of origin adds value in consumers' eyes as it represents a significant choice criterion [4,8] participants prefer the French wine and were willing to pay more for the French wine as opposed to the Texas wine. However, there is no such study done in emerging market as per our literature research. In 2007, Wansink, Payne, and North conducted a wine taste experiment testing two identical wine samples to find the effects framing can have on a consumer's perceptions of quality. The students who believed they were tasting a California wine indicated both more favorable expectations for the wine's taste prior to consumption as well as a more favorable rating of the wine's taste after consumption when compared to the students who believed they were tasting a wine from North Dakota. Though in reality both groups had tasted the same inexpensive wine. This indicates that quality perceptions can be more influential than actual quality attributes. Due to globalisation there is greater availability of different wines available in the market. It is good variable to study on role of origin image on wine preference.

### Identification of variable and conceptual framework

In emerging market like India where wine consumption is in infancy stage, role of branding on consumption could be an interesting variable along with country image. Wine is consumed by upper middle class and young people as they are more exposed to globalisation. Understanding their mind set towards foreign brands when compared to local brands is an interesting conceptual framework specially in emerging market like India. Impact of foreign Brand consumption pattern in emerging market like India which is culturally different but is changing may be interesting to study in research. Globalisation and availability of different wine products due to liberalised economy has opened the avenues for consumption of different brands in India. Therefore, it will be interesting to study the consumption pattern based on country of origin and brand image based on country.

### Objectives of the Study

The objective of the study was to find out the perception and consumption of wine in India—an emerging market. It also sought to test that country of origin wine consumption has significant effect on consumption irrespective of price. India is emerging as one of the fastest consumers of wine due to rapid economic growth and globalization. Many Indian companies are entering into manufacturing of wines in India. There is a growing trend among Indians to celebrate the events with wine. These two objectives were taken while developing hypotheses.

### Development of hypotheses

Wine consumption is a part of celebration in upper middle class and young Indians. The researchers sought to test the following specific proposition based on identified variables:

Wine culture is developing in India specially in age group (up to 35) in India (H1). France, Australia, Spain, Chile, USA and India formed the country of origin cue set for study. All are producers and exporters of varietal wines and have presence in India.

It is presumed that Indians will prefer more foreign brand due to quality when compared to Indian wines irrespective of price (H2).

Many academics comment on the need for increased emphasis on branding to ensure success in the future [8,9]. Effect of country –of – origin may differ depending upon consumer’s demographic, social and economic strength [9]. New Zealand, Australia, Chile, France and USA formed the country-of-origin cue set.

There is trend to consume wine during celebration. It is essentially for a festive or a weekend one – and new occasions when wine is drunk [10]. Wine drinking is more during celebration not routine in emerging market like India (H3). However, There appears to be a paucity of empirical research of branding in the wine industry [5].

## Methodology

The present study was taken in Nashik as it is the highest producing city of wine in India. This was extended to Mumbai-also called mini India and financial capital of India in second phase using the same questionnaire. This research evaluates the perceptions and wine consumption in India. The data for this study were obtained using a survey instrument administered through personal interviews during July –September of 2012 in India. A random sample of 280 respondents is collected in Nashik city which produces maximum wine in India and Mumbai. The respondents were businessmen, managers, tourist and youth who regularly visit bars and restaurants. The data collected were analyzed using SPSS, a statistical software program. It was more a descriptive research design by nature.

## Questionnaire design

The questionnaire is based on global research carried out in collaboration with San Francisco State University. It was modified and designed to find out consumption patterns of various beverages, their liking for different types of wine, their preferences, factors affecting their purchase and country of origin were taken for the study for an Indian study independently. Likert scale was chosen due to the target participants’ familiarity with the scale, and the five points were chosen. Survey based on the questions provided in [11] were modified to suit the present study.

## Management

Students of MBA were involved in collecting the data. In complete forms were rejected. Each respondents were thanked on a random basis. This helped to have a better control on authenticity of samples.

## Results

Nowadays, people tend to view consumption of beverages as an act both as an experience and as a slice of life. It is also widely recognized

that memorable experiences occur during the consumption of goods and services. People tends to celebrate an occasion at evening social gatherings. In the present survey the respondents were asked about the type usage of drinks for their celebration. Age group of 25 to 35 consume wines more compared to other age groups. The Table 1 gives the details information on the same.

It shows that, p value for Consumption Pattern is 0.227 which is greater than level of significance (alpha = 0.05). As the mean level of individuals remains the same for consumption pattern is accepted.

The maximum mean is for Regularly and Very Frequently, which means that” regularly and very frequently” consumption pattern is most preferred among the individuals for the alcoholic beverages like beer and whiskey. There is no prominent wine culture followed by the people in India (H1). Consumption of wine is just for change and for sake of enjoyment and is developing.

Nashik is a city where wine is produced maximum in India and Mumbai is financial capital with more per capita income gave the same results. Even in America 64% of Americans who say that they consume alcohol show a slight preference for beer (40%) over wine (34%) as their alcoholic beverage of choice, with liquor the favorite of 22% [12]. Beer still dominates the alcoholic drinks market in volume terms, but it has been losing out to wine in many European countries and is now perceived to be old-fashioned and stodgy. Per capita beer consumption by consumers of legal drinking age is on the wane in France, Germany, the Netherlands and the UK. Spain, Sweden and Italy are showing modest growth on the same basis [13].

The second part of the study was to find out their wine consumption of domestic and foreign brand wines in a wine growing areas like Nashik city. Table 2 gives the preference of wine among the consumers (Figure 1).

From the above, it can be observed that, people don’t prefer imported wines as compared to domestic wines. This is attributed to price and not clear brand identity. This is in conformity of the results of Vrontis et al. [2] and. Domestic wines consumption dominates the Nashik market and people are inclined towards consuming domestic wines. People do consume domestic wines and majority of people have never tried for imported wines. People are not educated in terms of wine consumption.

Wine has been one of the runaway success stories of recent years, especially in countries with less tradition for wine drinking. The main barrier to consumption of foreign brands is the lack of perceived value-for-money. The use of alcoholic beverages in different parts of the world is influenced by economic, social, religious, and traditional

	Type of Beverages	Consumption Pattern					
		0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
1	Beer	4	14	28	10	34	44
2	Whisky	8	6	4	8	20	12
3	Wine	6	4	2	6	12	4
4	Other Alcoholic Beverages	10	12	6	8	6	12

H-O1: The mean level of individuals remains the same for various types of beverages

H-O2: The mean level of individuals remains the same for consumption pattern

**Table 1:** Consumption Pattern for various beverages (n=280).

Type of Wine	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
Domestic Wine	12	42	38	40	42	18
Imported Wine	36	12	14	26	30	10

**Table 2:** How often do you prefer to drink Wine? (N=280).

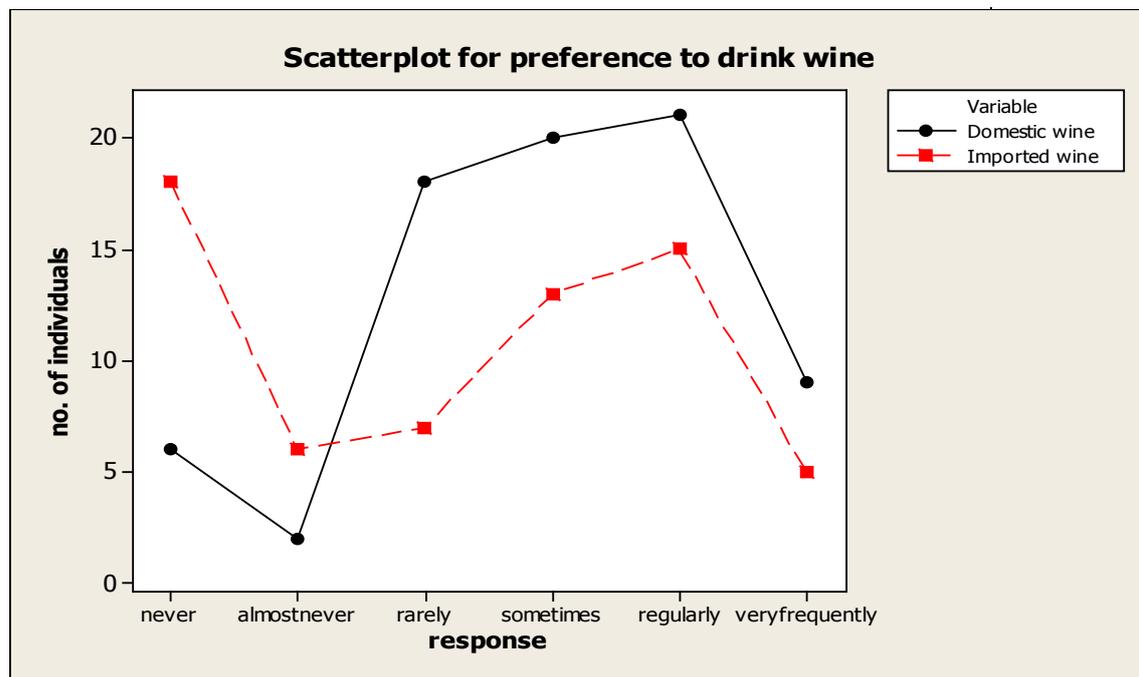


Figure 1: Scatterplot for preference to drink wine.

forces. Therefore countries differ significantly in the amount and type of alcohol consumed and in the temporal trends of use of alcoholic beverages. Italy and the United States are two examples of these differences: Italy is among the world's top producers and consumers of wine, while, in the USA, beer and spirits are more frequently consumed [14].

The next part of the study was to find out the source of information on wine consumers gathers on wine before consumption. This could help to target consumers accordingly through proper media. This is given in Table 3.

From the table it is observed that, people get more information about wines from Magazines and Friends. This means magazines and word of mouth from friends are effective source of information as far as wines are concerned. In emerging market if wines are to be promoted magazines are effective print media for promotion. There are very less Wine Clubs formed in city. Some people of Nasik like to consume wines in wineries like Sula winery, York winery and Dindori wines. Wine club is catching up in Mumbai.

Marketing's communication aids in informing, educating, and channeling consumers' needs [15] Wine and other alcohol products have been discussed extensively, particularly in relation to targeting new consumers, developing and launching new products, and impact of changing market conditions. many consumers are becoming less focused on merely receiving messages regarding brands and are actively searching for specific brand, varietal and vintage information. Under these conditions, integrating marketing communications becomes important to strategically coordinate brand and company messages based on a market-back understanding of consumers' perceptions of value. Wine marketers must recognize that building brand and channel equity requires more than a traditional mass media-oriented marketing communications approach [8]. 37% of wine drinkers in Australia "often ask the retailer for a recommendation on wine (<http://www.roymorgan.com>).

The top-listed channels of information on wines are learning about it at a friend's home and through friends and family generation [16] Wine consumers in key markets in Australia, New Zealand, Great Britain and the U. S. Australian and British consumers show a comparable incidence of red and white wine consumption [7]. Consumption of different types of wine in the present study is given in Table 4. The above table reveals that, the response for Rose Wine is more for "Very Frequently" which means that people of age group 25-35 from Nasik city like to consume Rose Wine very frequently and like to consume White Wine sometimes. However, as per study of [16] Generation Y consumers purchased a higher percentage of sparkling wine. This is contrary to our research findings. The other part of the study was to study the place of consumption of wine. As per study of [16] three generational groups purchased most of their wine at grocery stores, followed by Trader Joe's locations. Baby Boomers were less likely than others to purchase wine from liquor stores, but more likely than others to purchase wines through a wine club as per same study. Place of drinking wine is important. Indian scenario is given in Table 5.

Majority of the Indians consumes wine at bars and night clubs. Drinking at wineries and wine testing at shops are common. The consumer market for wine is composed of three main generations: the Baby Boomers (those born between 1945 and 1964), Generation X consumers (born between 1965 and 1976), and the Generation Y consumers (born between 1977 and 2000). All three generations indicated that good taste and good value for the money are the most important factors considered when purchasing wine. Premium-quality product was more desirable to Baby Boomers than to Generation Y consumers. Baby Boomers indicate that the health benefits of wine are more important to them than do Generation Y consumers [16]. Last part of the study was to have more information on acceptance of foreign origin brands and their perception. This is given in Table 6.

The most preferred brands are from Australia, Chile followed by France in India. Country-of-origin has a significant effect on

Type of Media	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
Internet	4	8	8	10	16	12
Magazine	4	10	6	14	2	24
Friends	6	6	8	2	2	20
T.V	4	4	6	2	2	10
Liquor Store	6	4	4	4	6	6
Wine Club	4	2	2	2	4	4
Wineries	8	4	2	2	4	2
Others	4	4	4	4	4	2

The above table was analyzed using **Ranking Method**.

Type of Media	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently	Rank
Internet	0 (0*2)	8 (1*4)	8(2*4)	15(3*5)	<b>32(4*8)</b>	30(5*6)	3
Magazine	0(0*2)	10(1*5)	6(2*3)	21(3*7)	4(4*1)	<b>60(5*6)</b>	1
Friends	0(0*3)	6(1*3)	8(2*4)	3(3*1)	4(4*1)	<b>50(5*10)</b>	2
T.V	0(0*2)	2(1*2)	6(2*3)	3(3*1)	4(4*1)	<b>25(5*5)</b>	4
Liquor Store	0(0*3)	1(1*1)	4(2*2)	6(3*2)	12(4*3)	<b>15(5*3)</b>	5
Wine Club	0(0*2)	1(1*1)	2(2*1)	3(3*1)	8(4*2)	<b>10(5*2)</b>	6
Wineries	0(0*4)	2(1*2)	2(2*1)	3(3*1)	8(4*2)	5(5*1)	7
Others	0(0*2)	2(1*2)	4(2*2)	6(3*2)	8(4*2)	5(5*1)	7

**Table 3:** How often do you get information about wines from these places?N=280.

Type of Wine	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
White Wine	8	14	20	30	10	4
Red Wine	10	16	10	16	10	6
Rose Wine	14	8	14	24	8	16
Sparkling Wines	6	8	16	6	12	4

**Table 4:** when you drink wine, how often do you drink the following types of wine? N=280.

Location	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
Home	30	4	2	8	0	0
Restaurants	6	4	2	18	8	4
Bars	0	4	10	6	8	28
Nightclubs	4	2	2	6	8	20
Wineries	4	2	10	6	14	10
Wine tasting shops	4	4	20	8	20	10

**Table 5:** when you drink wine, how often do you drink wine in the following locations? N=280.

Countries	0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
France	16	14	4	4	4	4
Italy	20	16	4	2	4	2
U.S. (California )	24	16	2	2	2	4
Australia	14	14	10	12	6	6
Argentina	26	6	4	4	2	2
Chile	10	6	4	4	8	2
Others	10	6	12	12	14	30

**Table 6:** How often do you drink wines from the following countries? N=280.

consumers' evaluation of a varietal wine. The study of Qenani-Petrela et al. [16] says that Italian wines are seen by generation Y consumers to be of higher quality. Daily wine consumers relied more on region of origin information than moderate consumers in the United States but this was not true in Australia and New Zealand. (Sutanonpaiboon and Thomas. ). This is not observed in present study. French and Australian wines are more preferred due to quality and word of mouth of sales persons of the store.

## Discussion and Conclusions

There is no prominent wine culture followed by the people in India-emerging market. There is lack of awareness about the various types of wines and their consumption pattern. Consumption of wine

is just for change and for sake of enjoyment as per present study. Age group of 25 to 35 consume wines more compared to others. Still wine consumption does not fit in to daily cultural routine of Indians.

Market of wine is growing in India and has good potentials for newer brands. Price can be important factors. Wine manufacturers with larger production facilities can achieve lower average costs, which can in turn facilitate lower pricing, increased marketing expenditure or capital investment. Wine from Australia, Chile, and Argentina are getting acceptance. This could be due to availability and affordability of the product. Their acceptance could be also due to country of origin effect and image. Generally, consumers tend to reflect more on country-of-origin when deciding to acquire durable or luxury goods [2,17].

Prospects of growth for wine in India are quite high. With the current growth rate of 25% to 30%, consumption of wine in Indian increase to 2 million cases by 2011 and 4 million cases by 2015. With growing awareness and new perceptions of young consumers, alcoholic beverages like wine may receive better social acceptance and demand may shift..

### Limitations of the Study

The wine making industry in India is small in total volume and unlike other countries, this is an industry that is difficult to research from the inside. Industry sources do not want to give any information. The research was carried out only in Nashik city -Largest centre of wine and Mumbai-Financial capital of India. Research in more cities can give additional information.

### Managerial implications

This research may help in to develop a framework for consumer-centered planning. Small wineries managers can evolve strategic marketing management based on contemporary developed consumer behavior and country-of-origin effects. Some of the findings relate to practical issues, and may help to develop brand equity of wine brands by updating of winemaking technology and viticulture through collaboration, producing better-quality products; adopting push strategies and international recognition. Sule wine has made attempt to get acceptance in more countries by adopting this strategy

	Type of Beverages	Consumption Pattern					
		0 = Never	1 = almost never	2 = rarely	3 = sometimes	4 = regularly	5 = Very Frequently
1	Beer	4	14	28	10	34	44
2	Whisky	8	6	4	8	20	12
3	Wine	6	4	2	6	12	4
4	Other Alcoholic Beverages	10	12	6	8	6	12

H-O1: The mean level of individuals remains the same for various types of beverages

H-O2: The mean level of individuals remains the same for consumption pattern

Two-way ANOVA: Consumption Pattern Vs Various beverages

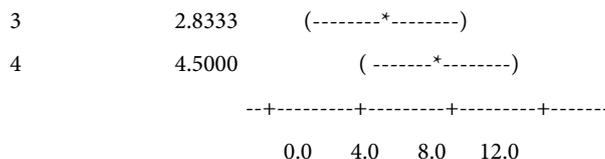
Source	DF	SS	MS	F	P value
Bevaerages	3	241.333	80.4444	5.06	<b>0.013</b>
Consumption pattern	5	125.333	25.0667	1.58	<b>0.227</b>

The above table was analyzed using TWO WAY ANOVA – Analysis of Variance.

It shows that, p value for Types of beverages is 0.013 which is less than level of significance (alpha = 0.05), this means that HO1; The mean level of individuals remains the same for various types of beverages is rejected. Thus, the mean level of individuals does not remain same for various types of beverages.

Individual 95% CIs For Mean Based on

Type of Beverage	Mean	Pooled St.Dev
1	11.1667	(-----*-----)
2	4.8333	(-----*-----)



The above table shows the mean level for 4 types of beverages i.e Beer, Whisky, Wine and other alcoholic beverages. The maximum mean is for **Beer**, which means **Beer** is most preferred beverage among the individuals.

Individual 95% CIs For Mean Based on Pooled StDev Consumption Pattern.

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