



UNIVERSIDADE CATÓLICA PORTUGUESA

The factors influencing consumers' behavior regarding champagne consumption in Portugal

Joana Pia Bruçó Geraldés de Barros Vale

Católica Porto Business School
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Universidade Católica Portuguesa to
obtain the masters' degree in Marketing

by

Joana Pia Bruçó Geraledes de Barros Vale

under the supervision of
PhD Joana César Machado

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Abstract

Managers of Champagne Houses and wineries are interested in understanding and predicting how consumer preferences will vary as a function of changes in their products' attributes and, thus, how they can positively affect consumers' perceptions and behavior.

The main purpose of this study is to gain a better understanding of the buying behavior of champagne consumers in Portugal, namely of the most predominant purchase decision variables that guide their consumption patterns and how the level of consumer involvement and the usage situation influence that impact. Particularly, the study identifies extrinsic attributes of champagne purchase decisions in various situational contexts, mapping those influencers on the choice of bottle in that particular environment. Using a choice set of ten reference attributes, the Best-Worst Scaling (BWS) method was applied in a survey with 206 Portuguese champagne buyers, to infer what attributes influenced consumer choice of the last bottle of champagne they purchased.

The findings in this paper provide a valuable contribution to champagne winegrowers and Houses in their marketing efforts, particularly as they establish a hierarchical relationship among extrinsic attributes that influence Portuguese consumers' behavior at the moment of purchasing a bottle of champagne and find relevant associations between those attributes and six classification variables, which can help optimize a champagne's competitive positioning and brands to overtake the challenges they face in the Portuguese market.

Keywords: Consumer Behavior, Champagne, Consumption Patterns, Purchase Decision Variables, Best-Worst Scaling Method, Luxury Products

Number of words: 9915

Resumo

Os gestores das empresas de champagne e das adegas estão interessados em compreender e prever a forma como as preferências dos consumidores variam em função das mudanças nos atributos dos seus produtos e como estas podem afetar positivamente as percepções e comportamento dos consumidores.

O principal objetivo deste estudo é obter uma melhor compreensão do comportamento de compra dos consumidores de champanhe em Portugal, nomeadamente, dos critérios de decisão de compra mais relevantes, e do modo como o nível de envolvimento dos consumidores com esta categoria e a situação em que o consumo ocorre influenciam esse impacto. O estudo identifica atributos extrínsecos das decisões de compra de champanhe em vários contextos situacionais, mapeando esses influenciadores na escolha da garrafa naquele ambiente em particular. Utilizando um conjunto de dez atributos de referência, o método Best-Worst Scaling (BWS) foi aplicado num inquérito a 206 compradores de champanhe portugueses, para inferir quais os atributos que mais influenciaram a escolha da última garrafa de champanhe que compraram.

Os resultados deste estudo fornecem uma valiosa contribuição aos viticultores e às casas de champanhe nos seus esforços de marketing, particularmente, porque estabelecem uma relação hierárquica entre os atributos extrínsecos que influenciam o comportamento dos consumidores portugueses no momento da compra de uma garrafa de champanhe, e encontram associações entre esses atributos e 6 variáveis de classificação. As conclusões deste estudo podem ajudar a otimizar o posicionamento competitivo de uma marca de champanhe e contribuir para ajudar a que esta ultrapasse os desafios que enfrenta no mercado português.

Palavras-chave: Comportamento do Consumidor, Champanhe, Padrões de Consumo, Variáveis de Decisão de Compra, Best-Worst Scaling, Produtos de Luxo

Número de palavras: 9915

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Introduction

Assessing the quality of a bottle of champagne prior to tasting is a complex experience, turning its purchasing into a challenging decision for most consumers. When choosing this type of products, consumers consider a series of intrinsic and extrinsic attributes, whose complexity makes it difficult to recognize their relevance on consumption decisions. Therefore, wine buying behavior is often based on extrinsic factors, such as brand name, origin of the wine, medals/awards and label design, due to the struggle in assessing the intrinsic characteristics before the bottle is opened (Cohen, 2009). The marketing of a luxury wine is combined with the consumer's experience, preferences, knowledge, self-confidence and the situation the wine is to be consumed, to form a buying decision (Barber & Almanza, 2007).

A comprehensive review of literature into wine and champagne preference and some of the constraints faced by researchers in this field was continuously conducted over the last 6 months and is hereby presented. Next, the challenges in measuring consumer preferences as well as the issues of the most commonly used research methods are discussed based on the respective literature. Therewith these reviews, the BWS method, also known as Max-Diffs, was applied to conduct quantitative research held through an online questionnaire to 206 Portuguese champagne consumers.

The literature has been successfully establishing that different types of consumers often use different cues and have diverse motivations to purchase luxury wine, mainly due to differences in involvement, knowledge, experience and type of consumption, but there is still very limited literature on how

consumers perceive and why they purchase luxury wine (Wolf et al., 2016), particularly champagne. The research on those purchase decision variables is simply inexistent when it comes to Portuguese champagne buyers, so there is no data that justifies their consumption patterns. Moreover, in the specific case of champagne, to our knowledge, no studies of consumers' preferences have been conducted using the Best-Worst Scaling method, nor in Portugal nor worldwide. These are particularly significant research gaps, as Portugal registers the world's largest annual wine consumption *per capita* with 53,4 l/capita (Oliveira, 2019) and, according to the Comité Interprofessionnel Du Vin De Champagne, is consistently on top 30 of the main foreign markets for champagne.

In 2020, however, according to Comité Champagne (2021), the champagne trade in Portugal decreased by 29,2% in terms of volume (to 471 462 bottles of 75 cl) and by 28,9% (to 8.96 million EUR) in terms of value compared with 2019. This decrease is no exception in the context of champagne consumption, since according to the OIV, excluding Prosecco, sparkling wine was the category of wines that suffered the most in 2020 due to the Covid-19 pandemic. The overall sparkling wine industry witnessed a drop of 5% relative to 2019 in terms of volume and of 15% in value (OIV, 2020). Champagne in particular stands as the essential product and symbol of celebration in today's consumption society (Rokka, 2017). The distressing year of COVID-19 didn't allow nor inspired many events and social gatherings, hence jeopardizing sparkling wine and champagne consumption worldwide. Furthermore, and considering the importance of the Horeca channels for these products' distribution, the recurrent lockdowns and closure of restaurants, hotels, bars and nightclubs can also partially explain this generalized decline. Nevertheless, up until 2019 Portugal was continuously registering a positive evolution in terms of champagne consumption (see Appendix 1).

Thus, this study aims to assess the factors influencing Portuguese consumers' behavior regarding champagne, and to map these influencers hierarchically in terms of the importance consumers assign to them at the moment of purchasing a bottle of champagne. Furthermore, we intend to measure how the sociodemographic characteristics of Portuguese consumers, as well as their level of involvement with the product category and the usage situation of the champagne, affect the importance of those attributes.

This MFA will be structured as follows: first, an overview of the luxury wine and champagne market, including an analysis of the Portuguese champagne consumption over the last years and research on the purchase decision variables influencing consumer behavior will be presented. Then, we will present the research methodology. The following sections will include the main findings and respective discussion, followed by a conclusion addressing theoretical and managerial implications issues for future research and the limitations of this study.

Chapter 1

Literature Review

1.1. Luxury Wine and Champagne

Luxury brands are a complex combination of dedication to product quality, a strong set of values, implicit understanding of marketing, focus on detail and strategic emergence (Beverland, 2004). These brands have enormous power and, in many cases, set standards for the whole industry. Champagne is the perfect example of this phenomena, being the standard by which all sparkling wines are judged (Beverland, 2004).

The features usually attributed to general luxury products also apply to luxury wine in many aspects; however, when defining luxury wines, several additional attributes are used as distinguishing features. The importance of the region of origin in wine marketing and branding, for instance, is well-established in the literature (Johnson & Bruwer, 2007; Lockshin & Corsi, 2012). The origin of the wine is particularly relevant in the case of luxury wines: the sturdier the regional ties and the longer the history of viticulture in the region, the more the wine produced in that region is perceived as luxury (Wolf et al., 2016).

Most brands are owned by a single company or group of companies that are commonly owned, but there are a few exceptions when multiple independent companies share a brand. This type of trademark is usually from a single place or area from which they are inseparable and which offers a group of competing organizations a global and collective brand identity. Ultimately, this creates a form of dual brand structure, so that the individual companies benefit from their own brand identity as well as from the collective brand, for their close

relationship to the place of origin, the territorial brand (Morton et al., 2013). Champagne, a region that comprises a clearly defined wine-growing area in north-eastern France, is a seamless example of a successful territorial brand.

In the 19th and early 20th century, champagne became an essential component of a bourgeois lifestyle and a sign of social distinction (Guy, 2003) and nowadays it is undoubtedly the most prestigious effervescent wine throughout the world. Hence, Champagne Houses understand how to create prestige and improve quality perceptions, deeply relying on higher prices (Dawson, 1988) and using the cultural code of the upper class. Moreover, prestige-building includes, for these brands, elaborate communication and packaging (Heine et al., 2016).

Champagne is a luxury (Guy, 2007) product; thus, its consumption takes on a strong aesthetic dimension (Charters and Pettigrew, 2006). This is mostly due to the fact that champagne is a festive product, mainly consumed in specific social occasions where the image of the product is central. Accordingly, the design of champagne bottles and labels highly contributes to the consumer experience and satisfaction (Favier et al., 2019).

1.2. The Luxury Wine Consumer

We must acknowledge that there is no universal perception of luxury or luxury wine; primarily because perceptions and motivations for luxury wine consumption are influenced by consumer traits, namely wine knowledge, life cycle stage, level of income and culture (Wolf et al., 2016).

Spawton (1991) refers to a four-segment model of the wine market: Connoisseurs, Aspirational Drinkers, Beverage Wine Consumers and New Wine Drinkers, being that the first two are most likely to be consumers of luxury wines. Champagne connoisseurs regularly buy champagne and enjoy wine education.

They have a broad spectrum of tastes and like to experiment, although they are likely to have strong preferences and become brand loyal. Conversely, Aspirational champagne drinkers are concerned with the social and status aspects of champagne and tend to be attracted by what's fashionable, lingering in the search process and often seeking the assistance of retail staff (Morton et al., 2013).

Based on the luxury consumer categories established by Vigneron and Johnson (1999), champagne connoisseurs would correspond to the "Hedonist" and "Perfectionist" consumer profiles, meaning they are more interested in the satisfaction that the product offers, and place less emphasis on the price and more on the quality that derives from the properties and performance of the product. These consumers know what they want and rely on their own judgment, using price as a mere guide of quality during product selection.

Aspirational consumers, on the other hand, exhibit many of the features associated with "Veblenian," "Snob," and "Bandwagon" consumers (Vigneron & Johnson, 1999). For these consumers, price is important, with a high price being used as an indicator of prestige and quality. They often purchase products with limited supply to signal their status, or buy products to improve their self-image and impress other people, as they also have the financial means to purchase these type of product, especially if they see the situation as beneficial to their social standing (Beverland, 2004).

These classifications of champagne consumers are supported by the experts in the wine sector that we interviewed to guarantee Portuguese consumers fit into the general categories proposed in the literature (see Table 1). The quote below illustrates the experts' classification of champagne consumers in Portugal:

"I would say that in Portugal champagne consumers are divided into more or less 3 categories: those who seek the label either because they feel more secure or because they are references that the rest of the people validate, and these are

occasional consumers; others are beginners who are open to try various types of wines and here the price factor is what counts the most; and lastly the smallest category, the real appreciators who are making their own way and act more according to their purse than to fashions.” (Specialist A)

Overall, these wine consumers’ segments have assimilated categories implicitly associated with luxury wine consumption, centering the conceptualization of luxury on high prices, exclusivity and quality (Wolf et al., 2016). This applies in particular to the Connoisseur and to the Aspirational Wine Drinker as defined in Spawton’s (1990) segmentation. However, limiting champagne consumers to only Connoisseurs and Aspirational Drinkers fails to recognize their complexities, as these consumers have very diverse socio-demographic characteristics and levels of wine involvement, consuming champagne in a variety of circumstances and settings, particularly since there’s been an increasing democratization of luxury (Wolf et al., 2016). Identifying who is purchasing champagne is important to understand the dynamics of this product category, but understanding the reasons and in what context it is being consumed is equally important to a framework of champagne consumption.

1.3. Wine Consumer Involvement

The concept of involvement has been vastly studied and is known to have a considerable influence on consumers’ decision process (Laurent & Kapferer, 1985; Lesschaeve & Bruwer, 2010). It can be defined as the perceived personal relevance of a product to the individual’s needs, values and goals (Zaichkowsky, 1985) and it also refers to the level of excitement, interest or impulse induced by a particular stimulus or situation (Buchholz & Smith, 1991).

Consumers' level of involvement with a product is a significant variable influencing buying behavior, information searching, product diversity seeking, price awareness and attribute assessment (Zaichkowsky, 1985). Consumers with high involvement have greater motivation to search for information, are concerned about the product performance and quality and show willingness to compare alternatives, while less involved consumers show little interest in the product and brand alternatives, and are satisfied with a minimum level of product performance (Calvo-Porrall et al., 2019). Thus, highly involved consumers report greater satisfaction, as they have greater product knowledge and more accurate expectations of product performance and features, leading to better product choices, which, in turn, are more satisfying options (Richins & Bloch, 1988).

Spawton (1990) segmented the wine marketing based on wine knowledge and consumer involvement. The level of involvement of wine consumers has been categorized into both high or low involvement (Aurifeille et al., 2002) and has been established that these two segments of consumers behave differently (Barber et al., 2008). A highly involved consumer will typically spend more time in the wine shop, evaluate more information before purchasing a bottle and buy different types of wine for different consumption occasions (Hall & Lockshin, 2000; Laurent & Kapferer, 1985; Mueller et al., 2009), thus going through stages of "awareness and comprehension" (Bruwer & Buller, 2013). Conversely, a low-involved consumer will make a quicker decision, not investing much cognitive effort (Mueller et al., 2009) and will likely use a reduced number of product attributes, such as price and label design, to simplify their choice (Barber et al., 2007).

1.4. Consumption Situation

Whilst studies have usually revealed a relationship between product involvement and aspects of buying behavior, several researchers claim that effective segmentation of markets also needs to consider the usage situation (Quester & Smart, 1998).

According to prior studies, purchase intention depends on the extent to which consumers associate the product characteristics with their predicted consumption circumstances (Belk, 1974; Lockshin et al., 2001; Quester & Smart, 1998) and so people prefer certain products and brands for specific occasions. Belk (1974) suggests that ignoring the effects of different contexts when investigating consumer behavior is likely to provide unreliable results unless the consumers' or the alternatives' characteristics are so intense as to be influential transversely through all situations, which has been proven not to be the case of wine. Morton et al. (2013) found that the situation or when the wine is to be consumed is one of the main variables influencing the purchase of a certain bottle of champagne. A frequent way to segment the wine market is by drinking occasions, which are divided into two different categories: special occasions, namely celebrations, dinner parties and restaurant or family gatherings' meals; and casual occasions, including non-meal relaxing occasions at home, casual mealtimes at home and drinking in quantity in parties, for instance (Gluckman, 1986). The situational context has also been highlighted as a motivating factor on consumer purchasing decisions regarding champagne in particular, whether for an "every day drink at home" or a "celebration with esteemed hosts" (Lockshin et al., 2001).

Luxury products such as champagne are more likely to be more conspicuous when intended to be consumed in public than those that are privately consumed (Bearden & Etzel, 1982). Conspicuous consumption plays an important role in

influencing buying and consumption preferences in public contexts and is used to signal wealth, power and status (Vigneron & Johnson, 1999), a typical concern of Aspirational champagne drinkers (Spawton, 1991) and “snob” consumers (Vigneron & Johnson, 1999).

As champagne is a celebration wine (Charters, 2005; Spawton, 1990) and is used to “sacralise” an event (Morton et al., 2013), we expect that the occasion in which it is to be consumed will influence the importance of the extrinsic champagne attributes.

1.5. Purchase Decision Variables

1.5.1. Wine Variables

In the WA Wine Survey 1997, where over 250 Perth wine consumers were inquired about the importance they attributed to each selection criteria for the purchase of wine in a retail liquor store, results showed that the most important variable was Previous Purchase (Batt & Dean, 2000). The ranking of attribute importance was then filled by Price, Previous Consumption in Restaurants, Price Discounts, In-Store and Grape Variety.

Hall and Lockshin (2000) found multiple studies mentioning Taste, Type, Alcohol Content, Age (of wine), Color, Price, Brand, Label/Package, Practical (usability purpose) and Region as the most influential attributes in wine buying behavior. Again in 2003, the authors reviewed over 75 articles on wine consumer behavior, noticing that, despite their conflicting order of importance in the rankings, the following attributes were mentioned frequently: Tasting the Wine Previously, Origin, Price, Brand Name and Grape Variety (Lockshin & Hall, 2003).

Goodman (2009) found, to some extent, that Tasting the Wine Previously and Someone Recommending are key influencers in wine purchasing decision, followed by Grape Variety and Origin of the Wine, confirming what previous researchers and articles have been long stating.

Nunes et al. (2016) used the BWS method to study the buying behavior of wine consumers in Portugal, identifying the extrinsic attributes that influence their purchase choices in an off-premise context. Tasted the Wine Previously revealed to be the most valued reference attribute, followed by Region of Origin, Recommended by Friends, Grape Varieties and Brand Name. They concluded that the consumption behavior of Portuguese wine buyers is similar to that of other Western consumers, as Tasted the Wine Previously is often cited as the most significant attribute when buying a bottle of wine (Batt & Dean, 2000; Casini et al., 2009; Steve Goodman, 2009). The authors also found that information in store, point of sale and label design may arrive too late to influence wine purchase decisions: this behavior is more likely to be determined by prior contact with the product, someone's recommendation or by production decisions such as region of origin, grape varieties and quality (medals and awards).

A comparative review of these studies' results shows some conflicting order in the rankings of the influencers importance, but Tasted the Wine Previously, Someone Recommending, Price, Origin of the Wine, Grape Variety and Brand Name were all mentioned very frequently. Besides these factors, it is important to highlight that previous research showed that wine is selected and consumed for different reasons in different occasions (Dubow, 1992; Hall & Lockshin, 2000; Lockshin et al., 1997) and so the situational context is crucial to understand wine consumers' behavior.

1.5.2. Champagne Variables

Based on previous studies on wine consumer behavior, in the champagne literature and on interviews to wine and champagne experts (see Table 1), we identified the ten attributes that should be most influential in the champagne purchase decision. These attributes will be explained following.

Specialist type	Code Name	Description
Champagne importer/distributor	Specialist A	Mid 50s Managing Director of a wine trading company. Representative of Champagne Houses in Portugal and responsible for coordinating marketing and sales to large retailers. A connoisseur, who regularly buys champagne and sees wine education as a hobby.
Champagne marketer	Specialist B	Late 40s champagne salesman and marketer. Representative of a Champagne House in Portugal and responsible for coordinating marketing, private clients and door-to-door sales to restaurants. Often organizes and participates in wine tastings.
Sommelier	Specialist C	Mid 40s Sommelier at a high-end restaurant in Porto. Trained and knowledgeable wine specialist to whom consumers may turn for advice in the moment of purchase. Has worked in the wine business for 15 years. Wine connoisseur.

Table 1 - Profile of the specialists consulted to validate the champagne attributes and the usage situations.

- 1. Tasted the Wine Previously** – As previously mentioned, having already tasted the wine is regularly mentioned in the literature as the most influential attribute when purchasing a bottle of wine. In a study conducted to compare retail consumer wine choices, Goodman (2009) found that this was the most important attribute in eight of the twelve countries he selected for this comparison. Nunes et al. (2016) used the BWS method to study the buying

behavior of wine consumers in Portugal, identifying the extrinsic attributes that influence their purchase choices in an off-premise context. They concluded that the consumption behavior of Portuguese wine buyers is similar to that of other Western consumers, as Tasted the Wine Previously is often cited as the most significant attribute when buying a bottle of wine (Batt & Dean, 2000; Casini et al., 2009; Steve Goodman, 2009). Consumers tend to go for the wines with the lowest perceived risk (Hall, 1999; Mitchell & Grottel, 1989), namely with the lowest functional risks, which include social, financial – particularly high in the case of luxury wines – and physical risks and the actual taste of the wine (Mitchell & Grottel, 1989). Thus, the chance to taste the wine before buying is considered to be the most relevant risk reduction strategy (Batt & Dean, 2000).

- 2. Brand Name** – Consuming luxury products such as champagne has been associated with conspicuous displays of wealth and purchasing prestige and well-known brands are considered a sign of wealth and status (Dubois & Duquesne, 1993). This so called “image variable” (Erickson et al., 1984) is not a physical characteristic of the champagne (intrinsic quality cue), but strongly identifies with the product itself and, therefore, must be considered when evaluating its numerous aspects (Verdú Jover et al., 2004). Brand Name is particularly influential as it represents the wine maker, wine style and the corporate identity of the champagne (Verdú Jover et al., 2004). Mitchell and Grottel (1989) consider “remaining loyal to a known brand” and “using top of mind brands in unfamiliar product segments” as two of the six strategies consumers can use to reduce risks. The presence of the brand name on a product can act as a replacement for information and, thus, turn the purchase into a simpler process (Chaney, 2000). Spawton (1991) suggests

inexperienced wine consumers tend to purchase "safe brands" with which they have had past experience.

3. High Price – When it comes to luxury wine, a relatively high price is seen as a way to increase the perceived conspicuous value of the product (Vigneron & Johnson, 1999). Consumers frequently correlate a high price with a high quality product and because they are unable to assess champagne's performance prior to consumption, they look for surrogate indicators such as pricing to try to predict it (Salolainen, 1993). Nevertheless, Vigneron & Johnson (1999) suggest the more experienced and involved with champagne the consumer is, the less importance he/she gives to price and that the opposite happens with the Aspirational Drinker, who uses it as an indicator of prestige and excellence. Luxury products with high enough prices are bought by snobs and conformists and when the product is very exclusive or rare no real distinction is made beyond the income level of the consumer (Godey et al., 2009).

4. Bottle and Label Design – Packaging is the buyer's first contact with a product, heavily influencing the impression on the brand, its quality or value. As the perceived quality of a product is often initially assessed through the appearance of its packaging (Bae et al., 2019), many researchers have investigated its impact on consumers. Choosing a simple versus a complex design is part of how the brand expresses its identity and serves to communicate it to the consumer (Favier et al., 2018). Previous research indicates that the simplicity/complexity of a package has a significant impact on brand perception. Simplicity is usually associated with modernity, reliability, authenticity, success and sobriety and simple packaging designs seem to generate positive beliefs concerning product quality (Favier et al.,

2019). These beliefs often lead to positive behavioral responses such as purchase intent (Bloch, 1995).

5. **Recommendations from friends / relatives** – The literature has been consensually considering this extrinsic factor as highly influential when deciding on a bottle of wine (Batt & Dean, 2000; Steve Goodman, 2009; Hall & Lockshin, 2000; Nunes et al., 2016). Spawton (1991) found that learning from others is a major risk reduction stimulus used to reduce purchase anxiety, where consumers become aware of a certain wine based on the expertise and experience of others they trust. Regarding luxury wine in particular, Morton et al. (2013) found literature on wine marketing research suggesting there are seven main variables influencing the selection of a bottle of champagne, one of the most important ones being “recommendations from friends, family, wine journalists or sales assistants”.

6. **Grape varieties** – Champagnes are usually divided into three groups primarily based on their grape composition: Blanc de Noirs (100% Pinot Noir and/or Pinot Meunier – red grapes), Blanc de Blancs (100% Chardonnay – white grapes), and blends (white plus red grapes), whose labels report the exact proportion of each grape variety as an indication of the expected flavor (Harrar et al., 2013). Accordingly, Zaichkowsky (1985) argues that the highly involved wine drinkers consider aspects such as grape varieties to estimate the quality of the product, instead of cues like price or brand recognition. Furthermore, the more sophisticated and knowledgeable the consumer, the more likely he/she is to prefer wine makers who present products customized to that particular consumer's requirements, which is the case of the treatment and the use of a particular grape variety (Spawton, 1991).

7. **Vintage (age of wine)** – Wine is a highly variable product in terms of the style, origin, grape variety and vintage (Mitchell & Greated, 1989), making these characteristics worth studying. Batt & Dean (2000) found vintage date to be a relevant attribute, as wine varies from year to year and such complexity represents, to the average wine consumer, a considerable level of uncertainty. Some more experienced and involved champagne drinkers derive pleasure from learning and knowing about the product and only a few have the aptitude to distinguish different vintages and styles (Morton et al., 2013). This conclusion is aligned with the opinion of the specialists we interviewed for this research (see Table 1):

“There are very few evolved consumers [in Portugal] who decide based on grape varieties, vintages or moment of consumption.” (Specialist B)

8. **Quality (medals / awards)** – Nunes et al., (2016) found that information in store, point of sale and label design may be cues that arrive too late to influence wine purchase decisions: this behavior is more likely to be determined by prior contact with the product, someone’s recommendation or by production decisions such as region of origin, grape varieties and quality (medals and awards). According to Batt & Dean (2000), who did a research on the factors influencing consumers’ decision to purchase wine in a retail liquor store context, the “previous experience” factor in wine comprises the presence of medals and awards and this was found to be the most important factor in that decision. Although, we could not find this attribute in the champagne literature specifically, quality (medals/awards) is often mentioned as a determinant attribute in wine buying behavior, particularly in Portugal (Nunes et al., 2016), so we decided to add this variable to our study.

9. Taste / matching with food – Spawton (1991) defines the core benefit of a certain wine as the motive a consumer chooses it over other alcoholic beverages. The author argues core benefits may be (1) celebration – sparkling wine, or (2) wine with food – table and dessert wines. However, with the recent democratization of luxury, people are increasingly consuming champagne in a greater variety of occasions and settings (Wolf et al., 2016). Wine lists highly contribute to restaurants' performance, as consumers are now searching for more than just a meal when dining out, and wine is a dimension customers value that might be decisive in selecting one restaurant over another (Sirieix et al., 2011). Food pairing heavily influences consumer behavior, as it can enhance taste and enjoyment (Spawton, 1991).

10. Accessible Price – Most wine consumers do not understand the quality of wine or are unable to distinguish wine quality by examining tangible factors such as the quality of the packaging, the bottle shape or the information presented on the label, so price is a common means used as the main selection criterion (Spawton, 1991). Champagne's high prices are part of its positioning as a luxury product. Thus, opposite from classical wines, we could not find "low prices" in the literature to even be an attribute of champagne. We could, however, with a help of Portuguese wine and champagne specialists (see Table 1), find that Portuguese consumers consider "accessible prices" to be determinant when purchasing a bottle of champagne, even with high purchasing power clients being price sensitive:

"The factors you listed for the purchase decision are very correct for evolved markets. In my "street" experience, in Portugal, 90% of it comes down to label/brand recognition and price. (...) A low price is decisive, even for customers with high purchasing power." (Specialist B).

“I want to emphasize that the price factor is fundamental but, it is as difficult to sell an expensive champagne as a cheap one. What I have noticed over the years is that consumers tend to reject champagnes below €30/bottle because they think that being so cheap it will not be good.” (Specialist C).

Other variables have additionally been recognized as influential on consumers' engagement with champagne. For instance, self-esteem, accomplishment and family life were found to be essential values sought by sparkling wine (including champagne) drinkers to satisfy in their consumption and for high-involvement consumers “belonging” is an equally important core value (Judica & Perkins, 1992). Nevertheless, evaluating any wine is an extremely complex and difficult task, which ends up undermining the apparently rational behavior of champagne consumers (Morton et al., 2013). In an experiment, regular champagne consumers were requested to evaluate wine in three different information situations: simply by blind tasting, just by seeing the bottle or by a combination of both. Participants blind tasting the wines were not able to distinguish them, but were fast to make clear judgments about the champagnes when the labels were revealed to them (Lange et al., 2002). Other studies, however, have concluded that drinkers actually distinguish the products during champagne tastings, and that their hedonic score of wines may also vary significantly from their perception of the product's quality based on image and market reputation (Vignes & Gergaud, 2007). The literature even mentions that a few consumers view champagne as a separate product type and not as a wine category and so they are prompt to drink it more for symbolic and much less for hedonic motives than is the case with other wines (Charters, 2005).

1.6. Best-Worst Scaling

There are numerous ways to measure consumer preferences, being surveys with rankings/ratings the most commonly used method in wine marketing, followed by consumer panel data, which addresses individual purchases (Goodman et al., 2005).

Surveys imply consumers respond to questions regarding the importance they assign to various intrinsic and extrinsic attributes. However, there is no consensus across respondents on how they perceive and use ratings or rankings as consumers are subject to a large range of different biases (Goodman et al., 2005), resulting in scores that are either too similar or too difficult to interpret (Finn & Louviere, 1992). Another issue outlined by Steven Goodman et al. (2005) is that it is extremely difficult to assess which is the most important attribute or most preferred product among those being studied through a survey unless one clearly dominates the others. Besides, each attribute is often measured using a newly developed single-item rating scale, specifically made for that survey, so the reliability and validity of the scale is unknown. Attributes are generally not measured in relation to other attributes or even products that must compete for the same limited consumer resources and, even when this is the case, respondents are often not allowed to indicate that they like many or all of them (Goodman et al., 2005). Although some consumers might actually like almost all attributes or combinations, such responses do not provide adequate discrimination to help the managers in identifying real priorities (Finn & Louviere, 1990).

As for consumer panel data, although it provides strong evidence of what consumers actually buy, it is not well suited for testing new concepts or combinations of attributes. This research method shows what consumers purchase, but may hide information about their actual preferences, as attributes

or products with a higher market share are easier to buy and are therefore bought more frequently (Steven Goodman et al., 2005).

Finn and Louviere (1992) introduced the Best-Worst Scaling method, also known as Max-Diffs, a very simple and straightforward means of creating a set of consumers preferences and which does not have the aforementioned problems. Since then, there have been a handful of papers published using this method in the area of wine marketing (Casini et al., 2009; Cohen, 2009; Goodman, 2009; Nunes et al., 2016; Remaud & Lockshin, 2009) but none concerning champagne consumption specifically. BWS derives from the discrete choice method (Finn & Louviere, 1992) and it rapidly has become a popular way to study the importance of a particular issue to an individual or group in comparison to other issues (Burke et al., 2013). In the Max-Diffs method, instead of having to rate one item at a time, respondents are shown a predefined set of items from which are asked to choose the one they consider the best and the one they consider the worst (Finn & Louviere, 1992).

Numerous advantages have been associated with BSW method: (1) it is a relatively easy task for respondents because selecting the extremes on a scale is cognitively less demanding than evaluating all items at once (Burke et al., 2013; Nunes et al., 2016); (2) the process is much more statistical rigorous, compared to the standard Likert-type scale (Goodman, 2009); (3) it has a greater discriminatory power than other scale measures (Sirieix et al., 2011); (4) it provides the researcher with enough information to calculate accurate and comparable individual level scales (Nunes et al., 2016); and (5) it allows for better comparisons between geographies and segments (Cohen & Neira, 2003).

Chapter 2

Methodology

2.1. Research Approach

Survey-based research was conducted to produce statistics, that is, quantitative descriptions about the preferences of Portuguese champagne consumers. Respondents were asked standardized questions, self-administrated using Qualtrics, and their answers constituted the data to be analyzed. This data collection method was chosen because it facilitates respondents' access to the questionnaire, it is simple to answer, improves the response rate, protects confidentiality and ensures reliability (Lefever et al., 2007; Topp & Pawloski, 2002). The research software was selected as it allows for an adequate conjoint survey using the Max-Diffs methodology (Qualtrics, 2016).

To ensure representativeness of the population under study, the sample of 206 respondents was recruited using the researchers' personal and professional contact lists, trying to widen as much as possible the range of age, sex, educational background, level of income, region of residence and consumption habits when it comes to champagne. These were respondents we knew a priori that were champagne consumers. Thereafter, a snowball sampling method was conducted, asking individuals to name friends and relatives who were also champagne consumers, helping us recruit them to participate in the study.

2.2. Study Variables and Measurements

Through this study, first, we seek to explore how ten extrinsic attributes influence the buyer's decision at the moment of purchasing a bottle of champagne. Then, we seek to find correlations among the classification variables age, gender and income level and the attributes under study. Finally, we analyze how the classification variables of level of involvement and usage situation affect the importance consumers attach to those extrinsic cues.

The Zaichkowsky (1985) scale, that aims to measure both cognitive and affective involvement, was adapted to measure consumer involvement with champagne. For this research, it is only relevant to measure consumers' affective involvement with the product, hence, the items that study cognitive involvement were removed. This affective involvement scale consists of a seven-point semantic differential scale of bipolar adjectives: boring / interesting, unexciting / exciting, unappealing / appealing, mundane / fascinating and uninvolved / involving (see Table 2).

	Boring / Interesting	
	Unexciting / Exciting	
Consumer Involvement	Unappealing / Appealing	(Zaichkowsky, 1985)
	Mundane / Fascinating	
	Uninvolved / Involving	

Table 2 - Product Involvement Scale. Source: adapted from Zaichkowsky (1985).

The usage situations presented at the questionnaire (see Table 3) were formulated in conjunction with wine experts (see Table 1) to represent the most common situations in which champagne is consumed in Portugal, and also to facilitate participants' response. However, there are several situations for which

one could buy a bottle of champagne and researchers can never guarantee they include a set of situations that cover the full range of usage occasions. Hence, respondents could add their own experience if none of the above applied to the last time they purchased champagne, since consumer input regarding the usage situation in a free-response manner can help mitigate the problem of not covering all possible occasions (Hornik, 1982).

Usage situation	Situation type
During a meal at a restaurant	Public consumption
In a nightclub or bar	Public consumption
For consumption at home alone or with relatives	Private consumption
For consumption at friends' house	Private consumption

Table 3 - Champagne usage situations. Source: own construct.

In this MFA, the ten attributes under study (see Table 4) were combined into 6 choice sets of 5 items each (see Appendix 3). Respondents were then asked to choose the most relevant and the least relevant attribute in each set, meaning the most and least important decision influencer the last time they chose a specific bottle of champagne to purchase. Four or five alternatives per set are considered optimal for the respondent evaluation (Sawtooth Software Inc., 2013). Because our alternatives do not have a lot of words, they are fast to read and easy to understand, we chose to construct the Max-Diffs experimental design with five items per set. The way these sets were balanced in item frequency, positional frequency and orthogonality was established to satisfy the optimal design characteristics defined by Sawtooth Software (2013), thus decreasing the likelihood of respondent fatigue. Thereby, each attribute appears the same number of times across all choice sets (three), never in the same position across sets (see Appendix 3) and each pair of attributes appears only once within each set (see Appendix 3). Sawtooth Software (2013) states the ideal number of choice

sets as **3 * items / items per set**. This suggests we should use $3 * 10 / 5 = 6$ questions in the study, which is indeed the number we used in our research. Finally, when the study aims to compare different people, for instance in segmentation studies, having multiple designs can be a source of variation between respondents, and may influence the segmentation (Bock, 2017). Thus, it was appropriate to build a single fractional factorial design (see Appendix 3).

Champagne Attributes.	
1	Tasted the wine previously
2	Brand Name
3	Recommended by friends / relatives
4	Bottle / label design
5	Grape varieties
6	Vintage (age of wine)
7	Low Price
8	Quality (medals / awards)
9	High Price
10	Taste / Matching with food

Table 4 - Extrinsic champagne attributes.

Demographic information regarding participants' sex, age, educational level and monthly income was also gathered to assess whether they are correlated to the attributes under study. Respondents had to meet three requirements in the beginning of the questionnaire: be over 18 years old, have Portuguese nationality and be a consumer of champagne. If the respondent does not meet these requirements, the survey will be considered completed.

Chapter 3

Results

3.1. Preliminary Analysis

3.1.1. Data Collection

The data collection of this study was conducted in Portugal in June 2022 through an on-line questionnaire sent by e-mail and digital platforms.

The survey had 378 valid answers, of which only 206 correspond to the study sample. After answering the first three filter questions, 172 participants – under 18 years old, not Portuguese, non-champagne drinkers – did not proceed to the next section. It is important to note that all 206 respondents that got passed the filter questions fully completed the survey and so these correspond to our sample.

3.1.2. Sociodemographic Characterization

The final sample is composed by 206 Portuguese champagne consumers, of which 136 are male (66%) and only 70 are female (33,9%). Most answers (42,7%) came from individuals with ages between 51 and 60 years old, followed by 26,2% between 61 and 70 and 15,5% from 41 to 50. The age group with fewer valid participants corresponds to individuals between 71 and 80 (3,4%) years old. Regarding the educational level of the sample, results show that 24,4% of the participants have a bachelor's degree, 18,6% are post-graduates or have a master's degree and 4,5% are high school graduates. Only 2 respondents (0,5%) have basic education and 15 (7,3%) have a PhD. In respect to the participants'

level of income, it is to note that 66 participants (32%) have a monthly household income of more the 5000€. The income range with the second most participants is from 3001€ to 4000€, with 37 respondents (18%), followed by the range of 4001€ to 5000€, with 27 respondents (13,1%). The income range with fewer respondents is from 501€ to 1000€ and no participant mentioned to have a monthly household income of less than 500€. Finally, 35 participants (17%) preferred not to answer this question (see Table 5).

Characteristics	Frequency (n = 206)	Valid Percentage (%)
Biological Sex		
Feminine	70	34%
Masculine	136	66%
Age		
]20,30]	15	7,3%
]30,40]	10	4,9%
]40,50]	32	15,5%
]50,60]	88	42,7%
]60,70]	54	26,2%
]70,80]	7	3,4%
Education Level		
Basic Education	2	0,5%
High School	17	4,5%
Bachelors	92	24,4%
Post-Graduate/Masters	70	18,6%
Other	25	6,6%
Income Level		
Between 501€ and 1000€	2	1%
Between 1001€ and 2000€	16	7,8%
Between 2001€ and 3000€	23	11,2%
Between 3001€ and 4000€	37	18%
Between 4001€ and 5000€	27	13,1%
More than 5000€	66	32%
Preferred not to answer	35	17%

Table 5 - Sociodemographic sample characterization. Source: SPSS output.

3.1.3. Champagne Consumption Characterization

To gain a better understanding of respondents' relationship with champagne, the questionnaire includes a question aiming to identify the champagne consumption frequency. Results show 98 participants (47,6%) drink champagne once every two months or less and 52 participants (25,2%) drink it once a month. Next, with 24 participants (11,7%) is the group with a consumption frequency of once every fifteen days and only 16 respondents (7,8%) drink champagne several times a week, the same number of respondents who drink it once a week (see Table 6).

Characteristics	Frequency (n = 206)	Valid Percentage (%)
Champagne Consumption Frequency		
Several times a week	16	7,8%
Once a week	16	7,8%
Once every fifteen days	24	11,7%
Once a month	52	25,2%
Once every two month or less	98	47,6%

Table 6 - Champagne consumption frequency of the sample. Source: SPSS output.

3.1.4. Usage Situation of Champagne

To study the effect of the usage situation on the champagne attributes under study, we asked respondents to mention the last time they purchased/consumed a bottle of champagne, so that all answers that follow would correspond to that particular experience. At home alone or with relatives was the most frequent consumption moment, with 100 participants (48,5%) selecting that option, followed by consumption at a friend's house, with 56 participants (27,2%). During a meal at a restaurant was the last usage situation of champagne of 37

respondents (18%) and only 3 respondents (1,5%) consumed champagne for the last time in a nightclub or bar (see Table 7).

Characteristics	Frequency (n = 206)	Valid Percentage (%)
Champagne Last Usage Situation		
During a meal at a restaurant	37	18%
In a nightclub or bar	3	1,5%
At home alone or with relatives	100	48,5%
At a friend's house	56	27,2%
Other	10	4,9%

Table 7 - Champagne last usage situation of the sample. Source: SPSS output.

3.1.5. Consumer Preferred Attributes

Attribute analysis can be presented in a number of ways. According to Loose and Lockshin (2013), average B–W scores can either have positive or negative values, meaning they are often difficult to interpret. For instance, a negative B–W value does not point to a negative attribute importance, but to a low one. The standardized ratio scale is reliable because each less important attribute can be interpreted as a ratio to the more important attribute (Loose & Lockshin, 2013) (see Table 5).

Each attribute has a coefficient (number) that represents its value to the consumer at a ratio level. Due to the nature of the method and the resulting analysis, the numerical score is not just a ranking but rather shows the degree of preference and can be compared across countries and segments to show similarities and differences (Goodman, 2009).

Of the attributes under study, brand name is unmistakably the most valued (100.0) in the process of choosing a bottle of champagne; quality (medals/awards) (77.4), matching with food (72.1) and recommended by friends/relatives (71.2) are important as well. On the other hand, tasted the wine previously (61.1) and

accessible price (46.5) are moderately rated by Portuguese champagne consumers, followed by grape varieties (29.6) and vintage (age of wine) (23.9) in terms of importance. Finally, high price (9.7) and bottle / label design (8.4) are the items ranked lowest, indicating that these attributes are of little significance in the evaluation process that precedes the purchase of a bottle of champagne (see Table 8).

It is important to note that negative scores are due to the way the scale is constructed (see Loose & Lockshin, 2013) and do not mean negative influences. The larger the negative score, the less important the attribute is, the higher the score, the more influence it has on the consumers' decision.

Label	Item #	Times best	Ti mes worst	(B-W)/n	Sqrt (B/W)	Standardized ratio scale	Standardized importance weights (%)
Brand name	2	282	55	1.102	2.26	100	20
Quality (medals/awards)	8	162	53	0.529	1.75	77.4	15.5
Matching with food	10	198	74	0.602	1.63	72.1	14.4
Recommended by friends / relatives	3	176	68	0.524	1.61	71.2	14.2
Tasted the wine previously	1	193	102	0.442	1.38	61.1	12.2
Accessible price	7	93	85	0.039	1.05	46.5	9.3
Grape varieties	5	59	128	-0.335	0.67	29.6	5.9
Vintage (age of wine)	6	53	182	-0.364	0.54	23.9	4.8
High price	9	8	161	-0.743	0.22	9.7	1.9
Bottle / label design	10	12	328	-1.534	0.19	8.4	1.7

Table 8 - Raw best and worst, average Best-Worst, and standardized aggregated importance weights.

3.2. Statistical Analysis

3.2.1. Measurement Model

To assess the validity of the measurement model, we started by conducting a scale reliability test, calculating the Cronbach's Alpha developed by Cronbach (1951), which ranges from 0 to 1, whereas values closer to 1 indicate a higher reliability (see Table 9). The scale reliability refers to the degree to which a scale is exempt from random errors and one way to evaluate it is by testing the internal consistency of the scale (Pallant, 2011).

Cronbach's Alpha	Bellow 0.6	Between 0.6 – 0.7	Between 0.7 – 0.8	Between 0.8 – 0.9	Above 0.9
Classification	Unacceptable	Bad	Acceptable	Good	Excellent

Table 9 - Cronbach's Alpha Classification. Source: Hill & Hill (2005).

According to Hill and Hill (2005) classification, this analysis indicated an excellent internal consistency for consumer involvement, as the Cronbach Alpha presents a value greater than 0.9 (see Table 10), thus, confirming the reliability of the scale.

Construct	Mean	Standard Deviation (SD)	Cronbach alpha (α)	Classification
Involvement				
Boring / Interesting	5,81	1,808	$\alpha = 0,962$	Excellent
Unexciting / Exciting	5,49	1,747		
Unappealing / Appealing	5,66	1,825		
Mundane / Fascinating	5,48	1,828		
Uninvolving / Involving	5,59	1,821		

Table 10 - Involvement scale descriptive analysis and reliability test. Source: SPSS output.

The overall score of level of consumer involvement was obtained by calculating the average of the answers given to the five questions related to this classification variable.

3.2.2. Correlation Analysis

One of the goals of this research is to examine the correlations coefficients of the BWS scores, using them as predictors of other constructs. This requires us to calculate BWS scores at the respondent-level, calculating individual ratings for each attribute under study, which was already done regarding wine preferences (de-Magistris et al., 2014).

There are several ways of calculating these scores, so we chose the most commonly used individual-level metric (Cohen, 2009; White, 2021). For each participant, we subtracted the number of times an attribute was selected as least important from the number of times it was selected as the most important. In our case, because each attribute appeared three times in the questionnaire, the potential values range from -3 to 3, whether the item was chosen as most important (1), least important (-1), or neither (0).

In order to establish the correlations between attribute importance and the classification variables of the study, we initially conducted a Spearman correlation (see Table 11). The Spearman correlation is a nonparametric measure of statistical dependence between the rankings of two variables for monotonic relationship (Shaikh & Barbé, 2019), which is proven to be robust to outliers (Croux & Dehon, 2010). This commonly used correlation estimator has a statistical efficiency above 70% for all possible values of the population correlation, thus providing a good compromise between robustness and efficiency (Croux & Dehon, 2010). The Spearman correlation between two variables, in our case between one metric and one ordinal, will allow us to understand the strength and direction of the association between them. A

positive correlation coefficient means the dependent variable (attribute importance) increases as the independent (classification) variable increases as well. Conversely, if the dependent variable tends to decrease as the independent variable increases, the Spearman correlation coefficient is negative.

Because sex is a dichotomous variable, we conducted a Point-biserial correlation to measure the strength and direction of the relationship that exists between that classification variable and the continuous variable – attribute importance. To study the relationship between attribute importance and the usage situation, we chose to group categories “during a meal at a restaurant” and “in a nightclub or bar” into "public consumption" and categories “at home alone or with relatives” and “at a friend’s house” into "private consumption". Consequently, Point-biserial correlation was also applied (see Table 11).

Attributes	Classification variables					
	Correlation coefficients					
	Sex ^b	Age ^a	Level of income ^a	Level of consumption ^a	Level of involvement ^a	Usage situation ^b
Brand name	0.061	0.164**	0.196*	0.063	0.013	0.116
Quality (medals/awards)	-0.094	-0.016	0.038	0.041	0.025	-0.113
Matching with food	-0.044	-0.028	-0.089	-0.002	0.116*	-0.168*
Recommended by friends / relatives	-0.123*	-0.076	0.064	0.040	-0.136*	0.158*
Tasted the wine previously	0.068	0.052	0.112	-0.038	-0.128*	0.087
Accessible price	0.013	0.047	-0.004	0.012	-0.105	0.018
Grape varieties	0.016	0.101	-0.008	-0.030	0.062	0.020
Vintage (age of wine)	0.109	-0.064	0.008	-0.079	0.054	-0.070
High price	0.000	-0.009	-0.077	-0.151*	0.133*	-0.117
Bottle / label design	0.025	0.034	-0.047	-0.055	0.108	-0.051

^a Spearman correlation; ^b Point-biserial correlation; *Correlation is significant at the 0.05 level; **Correlation is significant at the 0.01 level.

Table 11 - Correlation between attribute importance and the classification variables (Spearman correlation and Point-biserial correlation). Source: SPSS.

Our analysis of the relationships between the attributes and the classification variables reveals significant correlations between matching with food and recommended by friends/relatives and the classification variables level of involvement and usage situation. The positive coefficient between matching with food and level of involvement (0.116), as seen in Table 11, reveals that the higher the consumer's involvement with champagne, the more importance he/she allocates to this attribute. On the other hand, the negative correlation coefficient of -0.168 among matching with food and the usage situation indicates, in our case, that private consumption presents a lower value, hence, food pairing is not so important when the champagne is to be consumed in private and more intimate environments. The Spearman correlation coefficient, however, reveals the opposite associations among these two classification attributes and recommended by friends/relatives. Firstly, the more involved consumers are with the product, the less likely they are to look for friends and relatives' recommendations on which champagne to purchase. Secondly, the correlation coefficient between this attribute and the usage situation (0.158) means, in our research, that private consumption has a positive association with recommended by friends.

Through the Point-biserial correlation, we were able to assess that recommended by friends/relatives is the only attribute that seems to have an association with consumers' sex. In this case, the negative correlation between the variables (-0.123) means, in our case, that men present a lower value and that, as such, they assign less importance to this attribute than women (see Table 11).

According to Table 11, the Spearman correlation allowed us to conclude that brand name's influence on the choice of a bottle of champagne increases as the consumer is older and has a higher level of income. The analysis also revealed a significant correlation among tasted the wine previously and level of involvement, and the coefficient of -0.136 indicates a negative association

between these two variables. Finally, our statistical analysis shows the more frequently consumers purchase and drink champagne, the less likely they are to consider high price as a decisive factor. Oppositely, the coefficient of 0.133 reveals this attribute has a higher importance as the level of involvement increases.

The correlation analysis detected an absence of significant correlations among the attributes of quality (medals/awards), accessible price, grape varieties, vintage (age of wine) and bottle/label design and any of the classification variables of the study (see Table 11).

Chapter 4

Discussion

This research has established a hierarchical relationship among extrinsic attributes that influence Portuguese consumers' behavior at the moment they are deciding which bottle of champagne to purchase. The results of the Max-Diffs analysis have been presented, as well as the correlation between six classification variables and champagne's extrinsic attributes.

By using a Best-Worst standardized ratio scale, we have found that brand name is undoubtedly the most relevant attribute regarding consumer choice, supporting the thesis that consumers purchase those wines that have the least amount of perceived risk (Batt & Dean, 2000; Gluckman, 1986; Mitchell & Grotorex, 1989), opting for "safe brands" particularly when they are unexperienced (Spawton, 1991). Furthermore, we have determined that quality (medals/awards), along with matching with food and recommendations from friends/relatives are determinant influencers on champagne consumer behavior. These results are consistent with the fact that extrinsic attributes are often used as heuristic cues to indicate product quality (Teagle et al., 2010) because of the inability to assess the quality of a wine prior to its consumption. Unlike classical wine (see Nunes et al., 2016), having tasted the wine previously is only rated by Portuguese consumers as moderately important when deciding on a bottle of champagne to purchase, and not as the most relevant attribute. Grape varieties and vintage (age of wine), cues often used by highly involved and experienced wine drinkers (Morton et al., 2013; Zaichkowsky, 1985), seem to have little importance on consumers' decision making process. Hence, we may conclude that Portugal is not a very evolved market when it comes to champagne, despite its relatively high consumption. Brand name being so highly valued by our

respondents sustains the same conclusion, as this extrinsic cue is frequently used by unexperienced consumers (Spawton, 1991). Big companies that own well-known brands, such as Moët et Chandon, Veuve Clicquot, Pommery and Dom Pérignon, and produce two thirds of all Champagne wines, have an incomparably greater chance of success, and this is even more striking in risk-averse markets. The lack of importance attributed to a high price might indicate Portuguese consumers are very price-sensitive even when it comes to celebration and luxury wines, which could make it harder for less-known champagne brands to succeed in the Portuguese market, no matter the quality of its products.

The analysis of the relationships between champagne extrinsic attributes and the classification variables, allowed us to reach some interesting results.

The positive correlation between brand name and age might indicate the older the consumer gets, the fewer fluctuating habits and the more time he/she has had to develop his/her taste and preferences and to become brand loyal. Moreover, older people tend to have higher incomes levels, thus, there is also a positive association between brand name and level of income.

Our analysis shows that the higher the level of involvement, the greater the importance consumers attach to matching with food. These results are aligned with the literature, that suggest highly involved consumers spend more time and evaluate more information before purchase and buy different products depending on the occasion (Hall & Lockshin, 2000; Laurent & Kapferer, 1985; Mueller et al., 2009) and many occasions imply champagne as a food complement. On the other hand, there is a negative correlation between matching with food and usage situation. Most of our respondents that mentioned a public usage situation, referred to restaurants. Restaurants imply food consumption, so pairing champagne with the meal is naturally more relevant. Also, the presence of a wine specialist/sommelier that can guide this decision increases importance of this attribute. On the other hand, when champagne is enjoyed in a private

setting, its consumption is not always accompanied by food and there are not so many options. Hence, consumers need to drink what is available (bought or offered).

The positive correlation between high price and level of involvement contradicts the results of previous studies (Barber et al., 2007; Vigneron & Johnson, 1999) that indicate consumers with low involvement with the product tend to use high price as a quality indicator to simplify their choice, and that highly involved consumers use other cues. However, after discussing these results with specialists, we were able to conclude that, in the case of champagne, due to all its particularities, a higher price tends to indeed correspond to a higher quality and connoisseurs are aware of that fact.

Recommendations from friends/relatives is known to be a frequently used risk-reduction strategy, especially for those less experienced and involved with the product category (Spawton, 1991), which explains the negative correlation between that attribute and level of involvement. Highly involved consumers start from a base of knowledge and experience that allows them to decide for themselves with more confidence (Vigneron & Johnson, 1999). Thus, as Portuguese woman seem to consume less champagne than man and in fewer occasions, they have less experience with the product and a lower purchasing power, this target tends to look more for advice from trusted sources as a way to reduce purchase anxiety. Still regarding recommendations, there is less perceived social risk when champagne is purchased to be consumed in private settings, as consumers are naturally more afraid to making the wrong choice in front of others. Hence, when the usage situation is public, this attribute gains a greater importance in the choice of a bottle of champagne.

Lastly, the negative association between tasted the wine previously and involvement level is supported by the wine literature (Batt & Dean, 2000; Casini et al., 2009; Steve Goodman, 2009; Nunes et al., 2016), which generally argues this

is the most valued risk-reduction strategy, so less involved consumers assign a greater importance to this influencer.

We could not find any significant correlations between the champagne quality (medals/awards), its accessible price, grape varieties, vintage (age of wine) and bottle/label design and any of the classification variables of the study. Thus, we can conclude that in our sample, the relevance of these attributes is not a function of the socio-demographic variables, the level of involvement with the product category, frequency of consumption, or usage situation.

Chapter 5

Managerial Implications

The data collected in this MFA provides relevant information from a managerial perspective, as no previous empirical research has examined the factors influencing champagne consumption in Portugal and the relationship between these influencers and consumers' profiles or different usage situations. Furthermore, this study has proven that the BWS is a reliable method for designing and conducting champagne marketing research, and this is a flexible approach that allows the inclusion of new attributes that may become relevant in the future.

This paper constitutes a valuable contribution to champagne winegrowers and Houses in their marketing efforts as it provides them with insights on the criteria Portuguese consumers use to select a bottle of champagne. Based on our analysis, we reinforce the need of companies investing in their brands, as brand awareness is the most important attribute for Portuguese consumers when they are selecting a bottle of champagne and a substantial risk-reduction strategy. Furthermore, findings indicate that brands should include information on the bottle, for instance in the back label, regarding medals/awards that product might have won and recommendations for food pairing, as quality indicators and matching with food are fundamental decision criteria for consumers. These should also be used by champagne marketers, sellers and sommeliers as strategies to increase sales. Having tasted the wine previously is also a commonly used risk-reduction strategy, so we highlight the need for including champagne in wine tastings and organizing more champagne-related events, giving consumers the opportunity to try the product before purchasing.

The positive correlation between brand name and age suggests there is an opportunity for less-known or new brands to explore this market niche of younger consumers that are just starting their champagne experience and are not brand loyal yet. With this in mind, and considering smaller houses do not have the same financial power to run/support aggressive marketing campaigns, investing in social media might be a path to increase brand awareness and sales. The use of different, less conservative formats and designs, such as innovative bottle shapes and interactive labels with QR codes, for instance, may help brands reach new, younger audiences, more technology-driven, that ultimately are their future consumers.

Based on our research and field experience, in order to achieve the overall champagne category success in price-sensitive countries such as Portugal, and not just for a few well-established companies, it is necessary to lower margins at all levels of the value chain, from producers to distributors and retailers, resulting into more competitive prices and higher consumption levels. Overall, to develop the champagne category in Portugal, there is a need to offer consumers a larger range of choices and turn champagne consumption into a more natural activity. When there are few brands, such as it is the case in Portugal, the product is perceived as elite. When there are several references, brands, styles and price-ranges, consumers are more likely to take drinking champagne for granted. To achieve this, operators will have to try to create habits where they do not exist yet, thus expanding the offer and brands available in Portugal is fundamental.

Chapter 6

Limitations and Future Research

Despite the presented findings, this study has certain limitations which constitute space for improvement and give the opportunity for future research.

The first issue is linked to time constraints, which did not allow the development of a more complete review on such a complex matter and to collect a larger sample and one that is representative of the population under study. Moreover, in the BW method, designing the choice sets and extracting the data is relatively simple and straightforward once adequate computer software is available to facilitate it, which was not the case for us. Thus, these tasks took additional time that could have been dedicated to more important ones, such as segmentation analysis, for instance.

From the researchers' professional experience, Portuguese men are more likely to be purchasers and consumers of champagne than Portuguese women. Thus, we expected to have more male respondents to the survey, which turned out to be the case. According to Mulder & Bruijne (2019), women are more likely to respond to surveys than men, so we had to adjust our questionnaire to that reality. There are two conflicting factors that must be balanced when determining the number of questions: the more questions, the worse the data becomes, as respondents' fatigue increases; on the other hand, the fewer questions, the less data can be collected, so it becomes more difficult to take reliable and significant conclusions (Bock, 2017). In order to decrease respondents' fatigue, which the Max-Diffs scaling method already does intrinsically (Sawtooth Software Inc., 2013), we chose to study only the ten extrinsic attributes that were more frequently mentioned in the wine and champagne marketing literature and establish a low number of choice sets when compared with other studies that use

the same method. Hence, there is room for including other variables such as the level of alcohol, information on back label, discounts, promotional displays in-store and recommendations from specialists, like wine journalists or sales assistants, and to increase the number of item combinations under study, developing a more complex and complete fractional factorial design for choice sets. A study conducted by Nunes et al. (2016) in Portugal applying BWS to classical wine attributes contemplated eighteen attributes that were combined into eighteen choice sets, which eventually led to twenty eight significant relationships between the attributes and the six defined classification variables. In our research, we could only find ten correlations between the variables, which might be explained by a reduced fractional factorial design that only aggregated six choice sets. Thus, the number of attribute combinations and appearances was low and did not allow us to extract the desired amount of data.

Despite its various limitations, this research is pioneer when it comes to studying champagne consumption habits through the Max-Diffs analysis. Considering the growing importance of cross-national research in this era of globalization (Goodman, 2009) and that the Best-Worst method allows for better comparisons between geographies and segments than other methods (Cohen & Neira, 2003), this study constitutes a starting point to advance the contribution to champagne marketing. Hopefully, this MFA will interest other researchers to replicate this study in their own markets, therefore developing the luxury wine and champagne marketing.

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Appendices

Appendix 1 – Champagne Exports to Portugal

Year	Volume	Evolution (%)	Value in €	Evolution (%)
2020	471 462	-29,2%	8 958 938	-28,9%
2019	665 878	+6,2%	12 605 969	-3,2%
2018	627 133	+4,4%	13 025 872	+4,6%
2017	502 368	+19,6%	12 447 643	+22,0%

Table 12 - Champagne Exports to Portugal (2017-2020). Source: Statistiques Des Expéditions De Vins De Champagne, Comité Champagne, 2021

Appendix 2 - Fractional Factorial Design for Choice Sets

Attribute #	Choice Set #						Appearance
	1	2	3	4	5	6	
1	X	X	X				3
2			X	X	X		3
3	X			X		X	3
4			X		X	X	3
5	X	X			X		3
6	X			X	X		3
7		X		X		X	3
8		X			X	X	3
9		X	X	X			3
10	X		X			X	3
# of attributes in a choice set	5	5	5	5	5	5	

Table 13 - Fractional factorial design for choice sets

X – the attribute appears in the choice set.

Appendix 3 – Max-Diff Experimental Design

	Item 1	Item 2	Item 3	Item 4	Item 5
Choice set 1	1	3	5	6	10
Choice set 2	5	7	1	8	9
Choice set 3	2	4	10	9	1
Choice set 4	6	9	2	3	7
Choice set 5	8	5	6	4	2
Choice set 6	4	8	3	10	3

Table 14 - Max-Diffs Experimental Design

Appendix 4 – Questionnaire

Olá!

Este estudo faz parte de um Trabalho Final de Mestrado em Marketing na Católica Porto Business School, e pretende analisar os fatores que influenciam o consumo de vinho da região de Champagne, em Portugal. O seu feedback será uma valiosa contribuição para a realização deste estudo.

Este questionário deverá demorar cerca de 4 minutos a ser completado, uma vez que apenas é necessário responder a algumas perguntas de escolha múltipla. Todas as respostas são completamente anónimas.

Muito obrigada, desde já, pela sua disponibilidade e contribuição para este estudo.

Nota sobre privacidade: Todos os dados recolhidos através deste questionário serão utilizados apenas no âmbito desta pesquisa. Os requisitos e melhores práticas de RGPD serão aplicados ao processamento dos seus dados pessoais. Os dados pessoais serão mantidos em segurança e não serão partilhados.

1. Tem idade igual ou superior a 18 anos?

Sim_ Não_

(questão filtro)

2. Qual a sua nacionalidade?

Portuguesa_ Outra_

(questão filtro)

3. É consumidor de vinho espumante produzido na região de Champagne?

Sim_ Não_

(questão filtro)

4. Com que frequência bebe champagne?

- Mais do que uma vez por semana
- Uma vez por semana
- Uma vez a cada quinze dias
- Uma vez por mês
- Uma vez a cada dois meses ou menos

Agora, pedíamos-lhe que respondesse a um conjunto de questões sobre a sua relação com o (produto) champagne em geral:

5. Para si, em geral, champagne é um produto:

- Desinteressante _____ Interessante
- Pouco Estimulante _____ Estimulante
- Pouco Apelativo _____ Apelativo
- Banal _____ Fascinante
- Nada Envolvente _____ Envolvente

6. Por favor, indique em que circunstância comprou/consumiu champagne pela última vez:

- Durante uma refeição num restaurante_
- Numa discoteca ou bar_
- Para consumo em casa sozinho ou com familiares_
- Para consumo em casa de amigos_
- Outra_ Qual?

Agora, pedíamos-lhe que relembresse essa mesma ocasião de consumo, relacionada com a última vez em que comprou/consumiu champagne, e que respondesse a um conjunto de questões sobre a sua escolha.

7. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Ter experimentado antes da compra	
	Recomendação de amigos / familiares	
	Casta(s)	
	Vintage (idade do champagne)	
	Harmonização com a refeição	

8. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Casta(s)	
	Preço Acessível	
	Ter experimentado antes da compra	
	Qualidade (prémios / medalhas)	
	Preço elevado	

9. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha

apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Reconhecimento da marca	
	Design da garrafa / rótulo	
	Harmonização com a refeição	
	Preço elevado	
	Ter experimentado antes da compra	

10. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Vintage (idade do champagne)	
	Preço elevado	
	Reconhecimento da marca	
	Recomendação de amigos / familiares	
	Preço acessível	

11. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Qualidade (prémios / medalhas)	
	Casta(s)	
	Vintage (idade do champagne)	
	Design da garrafa / rótulo	
	Reconhecimento da marca	

12. Qual dos seguintes elementos foi o MAIS IMPORTANTE e qual foi o MENOS IMPORTANTE na sua decisão de compra? Por favor, escolha apenas um fator como o mais importante e um fator como o menos importante.

Menos	Fatores de Decisão	Mais
	Design da garrafa / rótulo	
	Qualidade (prémios / medalhas)	
	Preço acessível	
	Harmonização com a refeição	
	Recomendação de amigos / familiares	

Para terminar, responda por favor a algumas questões sobre si:

13. Sexo: F_ M_

14. Idade: ____

15. Nível de Escolaridade

Ensino Básico_

Ensino Secundário_

Licenciatura_

Pós-Graduação/Mestrado_

Outro_ Qual?

16. Indique, por favor, o nível de rendimento mensal líquido do seu agregado familiar:

Menos de 500€_

Entre 500€ e 1000€ _

Entre 1001€ e 2000€ _

Entre 2001 e 3000€ _

Entre 3001€ e 4000€ _

Entre 4001 e 5000€ _

Mais de 5000€ _

Prefiro não responder _