

Understanding Australian Wine Consumers' Preferences for Different Sparkling Wine Styles

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Abstract: This study investigated the perceptions and preferences of Australian wine consumers towards different styles of sparkling wine, including French Champagne and Australian sparkling white, red and rosé wine, Moscato and Prosecco. An online survey of 1027 regular sparkling wine consumers captured demographic information, sparkling wine perceptions and preferences, and typical spending and consumption patterns. Consumers were segmented into three distinct clusters ('No Frills', 'Aspirants' and 'Enthusiasts') using the Fine Wine Instrument model. The majority of No Frills consumers were female and typically consumed sparkling wine once per month. Almost 55% of Aspirants were male with a household income of more than AU\$75,000. Enthusiast consumers were also predominantly male and well educated, and 64% were under the age of 35 years. Sparkling white wine and Champagne were generally the preferred styles for each consumer group, followed by Moscato and sparkling rosé wine. Interestingly, Moscato scored favorably with both No Frills and Enthusiast segments. Almost 25% of respondents indicated that they were not familiar with Prosecco, while sparkling red wine was perceived similarly by male and female consumers. The findings from this study can be used by sparkling wine producers to better target their products and marketing to the specific needs and expectations of consumers within different segments of the Australian domestic market.

Keywords: sparkling wine; Champagne; Prosecco; Moscato; consumer behavior; wine marketing; market segmentation; Fine Wine Instrument

1. Introduction

When summarizing the key findings from wine consumer behavior research published over the past decade, Lockshin and Corsi highlighted the importance of researching premium and luxury wine behavior, successful marketing practices, and consumer behavior in emerging markets [1]. This included the value of wine tourism and marketing for value, as well as the relationship between grape and wine quality, and consumer behavior. Using market segmentation and a holistic approach to consumer behavior, a deeper understanding of consumer characteristics, habits, needs and expectations can be gained [2]. It is clear that a research gap exists with respect to classification of sparkling wine consumers and that categorization of consumers of this fine wine style would assist marketing strategies to target specific segments of the Australian domestic market.

Consumers' understanding of wine quality is a multi-dimensional construct [3] that is substantially dependent on their level of involvement [4]. Research indicates that more highly involved consumers are inclined to conceptualize wine quality more objectively (i.e., using cognitive dimensions), whereas less involved consumers assess quality subjectively (i.e., in sensory dimensions) [4]. A qualitative study suggested that motivations to consume sparkling wine are complex, but include its celebratory symbolic function, as well as perceptions of experiential consumption [5]. Croatian consumers consider the intrinsic characteristics of sparkling wine to be most important (i.e., sensory properties, price and quality), whereas wine appearance, expert reviews and wine awards were deemed to be less significant [6]. Nevertheless, consumers' reliance on extrinsic cues remains extremely robust even when sensory experiences are available [7]. In fact, it has been suggested that knowledge of how sparkling wine production methods impact wine style might influence consumer expectations [8]. The different methods of sparkling wine production strongly influence sparkling wine sensory profiles, and previous research involving segmentation of consumers based on their hedonic liking of different wines identified distinct consumer clusters [9].

Champagne is associated with feelings of luxury and gracious living [10], which are closely linked to perceptions of prestige [11]. However, the question of what constitutes a luxury offering depends upon the people involved, as well as the situational context [12]. According to Morton and colleagues, anecdotal evidence suggests perceptions of prestige and luxury in Champagne purchases are comprised of brand image, product presentation and taste [13]. Similarly, Italian Prosecco consumers often display high consumer loyalty due to the appeal of the appellation and its upper-tier price point [14]. Charters and colleagues previously noted that the fact that Champagne and sparkling wine is considered to be a special drink indicates that it should be marketed separately from other wine styles [15]. However, this approach requires careful consideration because although marketers would like this wine style to be distinct, they would also like people to consume it more than a few times each year [16]. In a simulated Champagne wine market, Steichen and Terrien demonstrated that in a repeated purchasing situation, personal capital and involvement somehow reduce the impact of the main determinants (reputation, price) used by consumers when making a purchase decision [17]. Territorial brands may benefit from maintaining open communication with competitors and creating collective trademarks in order increase their value [18].

New World wine consumers have a tendency to focus on the general impression of the image, and on the enjoyment and fun associated with drinking Champagne and sparkling wine [19]. Sparkling wine consumers often value a sense of belonging when considering their drinking behavior [20]. Federica and Perkins suggested that self-esteem, family life, and accomplishments were also important factors [21]. Sparkling wine consumption was higher among expert respondents [22] and consumers of sparkling wine have the greatest relative awareness of the shared appellations [23]. Expertise, specifically greater knowledge of wine, is strongly associated with higher consumption patterns and often predicts a higher liking of sparkling wine [24]. Interestingly, highly involved consumers are less likely to assume that Champagne is better than other sparkling wine styles, whereas less involved consumers are more at ease with traditional images of this product [25]. Advertising is given more consideration when consuming wine at impersonal occasions, whereas less conspicuous indicators (e.g., personal recommendations) are deemed more important for intimate consumption experiences [26]. Charters and Pettigrew noted complexity, a sensory descriptor frequently associated with high quality sparkling wine, was not a term commonly used by respondents with limited wine involvement [3]. Female consumers with low levels of expertise were found to consume significantly more sparkling wine than other consumer segments, with the exception of female consumers with medium levels of expertise [27]. Another study showed that white, sparkling and dessert wines represented a much higher proportion of female consumers' wine consumption than for males, with women consuming twice as much sparkling wine than men [28].

Across Anglophone countries, there is similarity amongst generation Y consumers' wine consumption behavior, including a perception that sparkling wine is a 'women's drink' and that generation Y consumers will 'grow into' drinking sparkling wine [15]; whereas older, affluent and well-educated consumers' sparkling wine purchasing decisions are more likely to be influenced by

the country of origin [29]. However, gender was not found to have any impact on the magnitude of country of origin effects [29]. A subsequent study by Müller [30] distinguished six sparkling wine consumer groups, namely, the undemanding, the brand conscious, the ambitious, the region of origin conscious, the vine variety conscious and the experts. The study indicated that experts, the vine variety conscious and to a lesser extent the ambitious perceived the country of origin of the sparkling base wine to be important to their purchase decision making process and their willingness to pay [30]. Since reputation governs the preference order of all consumers, each purchaser will choose the product with the highest reputation he or she can afford [31]. It has been observed that individuals with higher internal values and more complex social identities were less susceptible to normative influence and placed less emphasis on social brand benefits [32]. Moreover, the most expensive and heavily advertised products are not automatically those preferred by regular wine consumers [33].

Rokka discussed how the image of Champagne has transformed from a practically insignificant no-brand wine label in the fifteenth century to an expression of modernity and icon for the global leisure class and celebration [34]. Australian contemporary counterparts made by traditional, Charmat, transfer and carbonation production methods have been shown to have varying chemical and sensory characteristics [35]. Segments of consumers of these sparkling wine styles, including Moscato, have disparate preferences for varietal and complex wines. Moreover, individual liking scores have enabled the identification of two consumer clusters with opposing preferences for distinct styles of Moscato [36]. Grape variety has a strong effect on the manufacture of sparkling wines, and those produced from innovative varieties (including Moscato Embrapa and Villenave) contain a high concentration of esters [37]. Additional research has also confirmed that the production method of Moscato Giallo wines (traditional, Charmat or Asti) influences the volatile composition of the sparkling products [38].

Previous research from Germany showed that Prosecco was mostly bought by people who preferred white wines or who did not have any preference for red wine [39]. An earlier Italian study examining the behavior of Prosecco consumers found that Controlled and Guaranteed Denomination of Origin (CGDO) consumers typically expressed a preference for CGDO products, and that they might be more loyal than Controlled Denomination of Origin (CDO) purchasers [40]. Italian consumers buying wine from supermarkets were surveyed, and substantial differences were observed amongst preferences for brand, certification of origin, and production practices (e.g., sparkling vs. semi-sparkling) [41]. A model to derive a reasonable pattern of differences in willingness to pay for Prosecco between CDO and Typical Geographic Indication types has also been developed [41]. Lastly, sparkling red is considered to be an iconic Australian wine style developed by French winemaker August D'Argent in 1881 for the Victorian Champagne Company [42]. However, Cohen and colleagues indicated that sparkling white wines have a higher likelihood of success and frequent purchase as opposed to sparkling red wines, which might indicate 'change of pace' tendencies [43].

Given the trend towards increased consumption of sparkling wine and Champagne, particularly at special occasions, further research is needed to better inform winemaking and marketing decisions to ensure industry meets the needs and expectations of different segments of the consumer market. This study therefore sought to understand Australian consumer awareness of and preferences for different sparkling wine styles, and the influence of occasion and price on consumption behavior, using the Fine Wine Instrument [44] to segment consumers according to their wine knowledge and purchasing behavior.

2. Materials and Methods

2.1. Consumer Survey

Themes identified from an extensive literature review were used to develop an online survey, which was administered nationally using SurveyMonkey™ (www.surveymonkey.com; San Mateo, CA, USA). Australian consumers ($n = 1027$) were recruited using a market research company (TKW Research Group, Seaford, Australia; www.surveytalk.com.au), with participants from a broad cross-

section of states; prior to data collection, the survey was trialed by 10 South Australian consumers. Screening was performed using inclusion criteria that required participants to be at least 18 years of age and to have consumed sparkling wine at least 12 times per year on average. The survey took approximately 10–15 min to complete and data were collected over 2 weeks period. Participants were financially compensated for their time.

The questionnaire comprised three sections. The first section contained demographic questions relating to sex, age, education, and household income, as well as questions related to alcohol and wine consumption behavior. The second section measured fine wine behavior using the Fine Wine Instrument (FWI); a statistical model devised to segment consumers on the basis of wine connoisseur, knowledge and provenance variables [44]. Respondents were asked to indicate their level of agreement with a series of 18 statements using a 9 point category scale, where 1 = strongly disagree, 5 = neither agree nor disagree, and 9 = strongly agree. These statements were established in previous work by Johnson and Bastian [44] which investigated fine wine consumer involvement and identified three distinct types of consumers: ‘Enthusiast’ consumers, who exhibit connoisseur-like behavior, and are knowledgeable about wine and actively enjoy increasing that knowledge; ‘Aspirant’ consumers, who are less knowledgeable about wine, and less confident and adventurous in their wine-purchasing abilities; and ‘No Frills’ consumers, who display little connoisseur-type behavior, and who have little wine knowledge or involvement [44]. Section three of the survey examined participants’ attitudes towards and preferences for different sparkling wine styles, specifically, Champagne, Australian sparkling white, red and rosé wines, Moscato and Prosecco. Consumers were made aware that sparkling wine should only be called Champagne if it originates from the region of Champagne in France. For the purposes of this study, all other sparkling wine styles (white, red and rosé, Moscato and Prosecco) were assumed to be Australian. Survey questions asked participants to list words that they associated with each of the sparkling wine styles, as well as any known brands. Respondents indicated their preferences for different styles using 9 point Likert scales (where 1 = extremely dislike to 9 = extremely like). Participants were also asked whether they would be likely to consume different sparkling wine styles at a number of pre-determined occasions (e.g., birthdays, Christmas, New Year and others identified in a previous study [45]), again using a 9 point category scale (where 1 = never, 5 = sometimes and 9 = always). Finally, participants were asked how much they would typically spend on a bottle of each style of sparkling wine at a retail outlet; with response options being: never purchase; <AU\$15; AU\$15–\$29; AU\$30–\$49; AU\$50–\$79; and >AU\$80.

2.2. Data Analysis

Consumer data were analyzed using a combination of descriptive techniques (frequencies, percentages, medians, means and quartiles) as well as agglomerative hierarchical clustering and non-parametric testing. Mood’s median test [46] was used to test the equality of medians from two or more populations because the data are ordinal and the consumer segment responses did not follow a normal distribution. An examination of the interquartile ranges ($IQR = 3rd \text{ quartile} - 1st \text{ quartile}$) was also undertaken between the FWI segments for the different sparkling wine styles. The IQR is a measure of variability of FWI segment data (i.e., the spread of values), based on separation of a data set into quartiles. Fisher exact tests were used to test the association between qualitative variables given that some counts within contingency tables were less than 5. Statistical analyses were completed using XLSTAT 2016 (Addinsoft, New York, NY, USA). Qualitative analyses of word frequencies were performed using NVivo software Version 12 (QSR International Pty Ltd., Melbourne, Australia).

3. Results and Discussion

3.1. Influence of Consumer Segmentation on Preferences for Different Sparkling Wine Styles

Agglomerative hierarchical clustering using the questions developed by the FWI provided three distinct groups of wine consumers. As established by Johnson and Bastian [44], No Frills fine wine consumers demonstrate little connoisseur-type behavior, knowledge about wine or interest in the

provenance of their wine purchases. The majority of consumers in this group were female ($n = 287$, 65.1%) and typically consumed sparkling wine only once per month ($n = 256$, 58.1%) (Table 1). Aspirants share some similarities with the Enthusiast segment; however, their wine knowledge and wine involvement scores were all significantly lower. These respondents were not as confident in their wine-purchasing abilities and valued the opinions of others, including friends and family, staff at restaurants, wine retailers and wine writers [44]. Almost 55% of this segment were male ($n = 266$, 54.7%) with a household income of more than AU\$75,000 ($n = 289$, 59.5%). Finally, Enthusiasts exhibit connoisseur-like behavior by keeping records of their wine purchases, having a special wine storage space and ritually checking their wines for faults prior to consumption [44]. These consumers were also mostly male ($n = 62$, 62%) and well educated ($n = 66$, 66% holding tertiary qualifications), and 64% ($n = 64$) were under 35 years of age. This was in agreement with Johnson and Bastian [44], who found a significant proportion of Enthusiasts were male and/or under the age of 35, and therefore highlighted the potential value in tailoring wine marketing strategies towards this demographic. Australian sparkling wine producers might similarly benefit from targeting a younger, male demographic, in order to better engage Enthusiast consumers.

Consumers were asked to record the distribution of their alcoholic beverage consumption using percentage scales for alcohol type, wine type and wine style categories (0%–100%, summing to 100% for each consumer). Generally, regular sparkling wine consumers mostly drink wine (median = 50%), followed by beer (median = 10%), spirits (median = 10%) and cider (median = 1.0%) (Table 2). There were significant differences between the median percentages for wine ($p = 0.001$), beer ($p < 0.0001$), cider ($p = 0.002$) and other alcoholic beverages ($p < 0.0001$) consumed between all consumer segments (Table 2). The No Frills and Enthusiast categories, in addition to the Aspirant and Enthusiast groups, also demonstrated significantly different consumption percentages for the same alcohol types; (wine $p = 0.001$, beer $p < 0.0001$, cider $p = 0.001$, other $p < 0.0001$ and wine $p = 0.000$, beer $p < 0.001$, cider $p < 0.001$, other $p = 0.013$ respectively) (Table 2). Enthusiasts consumed the most varied styles of sparkling wine, specifically the most Champagne (median = 20%, IQR = 20%), Prosecco (median = 20%, IQR = 16.3%) and sparkling rosé (median = 10%, IQR = 20%). The No Frills segment did not consume Champagne (median = 0.0%, IQR = 10%), rather they preferred Australian sparkling white wine (median = 50.0%, IQR = 65.0%). Statistically significant differences between all segments ($p < 0.05$) were observed for each type of wine and style of sparkling wine. Furthermore, the majority of pairwise comparisons between groups (i.e., No Frills vs. Aspirants, No Frills vs. Enthusiasts and Aspirants vs. Enthusiasts) yielded statistically significant results ($p < 0.05$). However, there was no significant difference between the Moscato consumption of No Frills and Aspirant segments ($p = 0.103$), or the sparkling red consumption of Aspirants and Enthusiasts ($p = 0.065$) (Table 2).

3.2. Influence of Sparkling Wine Style on Consumer Perceptions and Preferences

Consumers were asked to list words and brands that they associated with each sparkling wine style, i.e., Champagne, sparkling white, red and rosé wines, Moscato and Prosecco. Forced open responses were collected, and participants could list as many or as few words/brands as desired. Similar to previous work undertaken by Verdonk and colleagues [47], word frequency analysis (including synonyms) was undertaken and is shown below, with results including word frequencies (i.e., the number of times each word appeared for each sparkling wine style) and weighted percentages for the top ten terms and brands (Table 3).

The words used to describe Champagne include ‘expensive’, ‘celebration’, ‘quality’, ‘France’ and ‘luxury’ (Table 3), supporting research indicating that Champagne houses have successfully projected an image of prestige, luxury and exclusivity [48]. Brands such as ‘Moët’ (19.6%) and ‘Chandon’ (8.5%), ‘Dom (5.4%) Perignon’ (4.6%), ‘Mumm’ (4.9%), ‘Bollinger’ (4.7%), ‘Veuve (4.7%) Cliquot’ (2.6%) and ‘Krug’ (1.8%) were most well-known. In contrast, Australian sparkling white wine was described as ‘bubbly’, ‘refreshing’, ‘light’, and ‘fruity’. There was little reference to quality or complexity; however, it should be noted that these wines were also associated with ‘celebration’ and special occasions. Furthermore, ‘Yellow’ (6.3%), ‘Jacob’s (5.5%) Creek’ (5.4%), ‘Yellowglen’ (4.8%), ‘Brown (4.9%) Brothers’ (4.2%), ‘Chandon’ (3.8%) and ‘Wolf (1.7%) Blass’ (1.8%) were

Table 1. Demographics of Fine Wine Instrument consumer segments (data are frequencies and percentages).

		Frequency Percentage (%)							
		All Consumers (<i>n</i> = 1027)		No Frills (<i>n</i> = 441)		Aspirants (<i>n</i> = 486)		Enthusiasts (<i>n</i> = 100)	
Gender	Male	482	46.9	154	34.9	266	54.7	62	62.0
	Female	545	53.1	287	65.1	220	45.3	38	38.0
Age	18–24	53	5.2	18	4.1	25	5.1	10	10.0
	25–34	307	29.9	122	27.7	131	27.0	54	54.0
	35–44	208	20.3	88	20.0	105	21.6	15	15.0
	45–54	181	17.6	77	17.5	91	18.7	13	13.0
	55–64	170	16.6	90	20.4	75	15.4	5	5.0
	65+	108	10.5	46	10.4	59	12.1	3	3.0
Household income (AUD)	<50,000	256	24.9	126	28.6	107	22.0	23	23.0
	50,000–100,000	417	40.6	176	39.9	199	40.9	42	42.0
	100,001–150,000	232	22.6	92	20.9	115	23.7	25	25.0
	>150,000	122	11.9	47	10.7	65	13.4	10	10.0
Education	High school	236	23.0	132	29.9	88	18.1	16	16.0
	Trade	298	29.0	141	32.0	139	28.6	18	18.0
	Undergraduate	271	26.4	109	24.7	132	27.2	30	30.0
	Postgraduate	222	21.6	59	13.4	127	26.1	36	36.0
Sparkling wine consumption	Once per month	471	45.9	256	58.1	197	40.5	18	18.0
	Once every 2 weeks	259	25.2	96	21.8	143	29.4	20	20.0
	Once per week	204	19.9	62	14.1	107	22.0	35	35.0
	More than twice per week	93	9.1	27	6.1	39	8.0	27	27.0
		Chi-Square Test		Marascuilo Procedure					
		All Segments		No Frills vs. Aspirants		No Frills vs. Enthusiasts		Aspirants vs. Enthusiast	
Sparkling wine consumption	Once per month	<0.0001 *		Significant		Significant		Significant	
	Once every 2 weeks	0.012 *		Significant		Not Significant		Not Significant	
	Once per week	<0.0001 *		Significant		Significant		Significant	
	More than twice per week	<0.0001 *		Not Significant		Significant		Significant	

* *p* values at significance level of 0.05.

Table 2. Average alcohol, wine and sparkling wine consumption of Fine Wine Instrument consumer segments.

		Minimum Mean Median Maximum															
		All Segments (n = 1027)				No Frills (n = 441)				Aspirants (n = 486)				Enthusiasts (n = 100)			
Alcohol type	Wine	0	52.3	50.0	100	0	52.2	50.0	100	2	54.3	50.0	100	7	43.1	40.0	100
	Beer	0	18.9	10.0	100	0	17.6	5.0	100	0	19.0	10.0	90	0	24.4	22.5	80
	Spirits	0	16.1	10.0	95	0	16.4	10.0	95	0	16.0	10.0	95	0	15.0	10.0	60
	Cider	0	8.9	1.0	90	0	10.1	0.0	90	0	7.2	0.0	70	0	11.6	10.0	50
	Other	0	3.9	0.0	100	0	3.7	0.0	100	0	3.5	0.0	70	0	6.0	0.0	45
Wine type	Sparkling wine	0	31.8	25.0	100	0	36.5	30.0	100	0	27.9	20.0	100	0	30.2	25.0	100
	White	0	27.7	20.0	100	0	30.6	25.0	100	0	26.5	20.0	90	0	21.0	20.0	90
	Rosé	0	7.2	2.0	100	0	6.7	0.0	100	0	6.9	5.0	60	0	11.3	10.0	60
	Red	0	25.5	20.0	100	0	19.5	10.0	100	0	31.3	30.0	100	0	23.7	20.0	100
	Dessert	0	4.1	0.0	90	0	3.8	0.0	90	0	3.9	0.0	70	0	6.0	5.0	20
	Fortified	0	3.6	0.0	90	0	2.8	0.0	90	0	3.5	0.0	50	0	7.9	5.0	70
Wine style	Champagne	0	13.9	5.0	100	0	8.1	0.0	100	0	16.6	10.0	100	0	27.2	20.0	100
	Sparkling white	0	45.5	40.0	100	0	51.1	50.0	100	0	44.3	40.0	100	0	26.4	20.0	100
	Sparkling red	0	10.7	0.0	100	0	8.4	0.0	100	0	12.4	5.0	100	0	12.0	10.0	100
	Sparkling rosé	0	8.4	2.0	100	0	8.0	0.0	100	0	8.4	5.0	100	0	10.4	10.0	40
	Moscato	0	17.3	5.0	100	0	21.5	5.0	100	0	13.8	5.0	100	0	15.7	10.0	100
	Prosecco	0	4.2	0.0	100	0	3.0	0.0	100	0	4.6	0.0	90	0	8.3	10.0	40
		Mood Test Multiple Pairwise Comparison <i>p</i> value															
		All Segments				No Frills vs. Aspirants				No Frills vs. Enthusiasts				Aspirants vs. Enthusiasts			
Alcohol type	Wine	0.001 *				0.361				0.001 *				0.000 *			
	Beer	<0.0001 *				0.005 *				<0.0001 *				0.000 *			
	Spirits	0.239				0.260				0.120				0.375			
	Cider	0.002 *				0.748				0.001 *				0.000 *			
	Other	0.000 *				0.014 *				<0.0001 *				0.013 *			
Wine type	Sparkling wine	0.002 *				0.000 *				0.134				0.256			
	White	<0.0001 *				0.071				<0.0001 *				0.000 *			
	Rosé	<0.0001 *				0.000 *				<0.0001 *				<0.0001 *			
	Red	<0.0001 *				<0.0001 *				0.000 *				0.002 *			
	Dessert	<0.0001 *				<0.0001 *				<0.0001 *				0.003 *			
	Fortified	<0.0001 *				<0.0001 *				<0.0001 *				0.05 *			

Wine style	Champagne	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
	Sparkling white	<0.0001 *	0.002 *	<0.0001 *	<0.0001 *
	Sparkling red	<0.0001 *	<0.0001 *	<0.0001 *	0.065
	Sparkling rosé	0.000 *	0.004 *	0.001 *	0.025 *
	Moscato	<0.0001 *	0.103	0.001 *	<0.0001 *
	Prosecco	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *

Data are the means and medians of a percentage scale (0%–100%). * *p* values at significance level of 0.05.

Table 3. Frequencies (and weighted percentages) of the top ten words and brands that consumers associated with different sparkling wine styles.

Word or Brand Frequency Weighted Percentage (%)																	
Champagne						Sparkling White						Sparkling Red					
expensive	224	11.7	Moët	421	19.6	bubbly	237	11.9	Yellow	143	6.3	red	109	6.7	none *	80	6.9
bubbly	137	7.1	Chandon	182	8.5	refreshing	209	9.0	Jacobs	123	5.5	bubbly	79	4.5	Brown	69	5.9
celebration	88	4.6	Dom	117	5.4	light	122	4.3	Creek	121	5.4	rich	78	4.3	Brothers	58	5.0
quality	60	3.1	Mumm	105	4.9	fresh	162	4.2	Brown	110	4.9	none*	69	4.2	Creek	30	2.6
French	51	2.7	Bollinger	102	4.7	fun	62	3.3	Yellowglen	109	4.8	sweet	58	3.0	Jacobs	27	2.3
luxury	51	2.4	Veuve	102	4.7	celebration	47	2.4	Brothers	94	4.2	sparkling	56	2.7	Seppelt	27	2.3
classy	50	2.6	Perignon	98	4.6	good	46	2.3	Chandon	86	3.8	strong	42	2.5	Penfolds	26	2.2
special	49	2.5	Cliquot	56	2.6	crisp	46	2.3	Glen	49	2.2	dark	39	2.3	Yellowglen	22	1.9
sparkling	43	1.9	Verve	52	2.4	fruity	39	2.1	Wolf	42	1.9	wine	32	2.0	n *	20	1.7
dry	38	2.0	Krug	39	1.8	nice	39	2.1	Blass	40	1.8	heavy	34	1.9	nil *	20	1.7
Sparkling Rosé						Moscato						Prosecco					
pink	161	9.4	Jacobs	88	7.5	sweet	485	27.1	Brown	271	17.8	none*	130	9.0	none *	110	15.0
sweet	153	7.6	Creek	85	7.2	none *	62	3.6	Brothers	239	15.7	(don't) know *	116	7.9	Brown	64	8.7
light	128	6.0	none*	79	6.7	light	74	3.3	none *	70	4.6	Italian	93	6.4	Brothers	54	7.4
bubbly	85	4.7	Brown	61	5.2	fruity	43	2.5	Gossips	64	4.2	dry	79	5.5	(don't) know	37	5.1
refreshing	82	3.7	Brothers	53	4.5	refreshing	57	2.3	Jacobs	55	3.6	sweet	69	4.5	nil *	25	3.4
none*	53	3.1	Yellowglen	37	3.1	wine	36	2.1	Creek	52	3.4	nothing *	56	3.9	n *	23	3.1
red	50	2.9	Mateus	26	2.2	(don't) know *	35	1.8	Banrock	48	3.2	(not) sure *	42	2.9	(can't) recall	17	2.3
nice	37	2.1	(can't) recall	22	1.9	bubbly	31	1.7	Station	43	2.8	wine	38	2.6	(not) sure *	17	2.3
wine	31	1.8	Yellow	22	1.9	delicious	31	1.7	Bros	29	1.9	never* (tried)	36	2.5	na *	15	2.1
(don't) know *	34	1.6	nil	21	1.8	nice	28	1.6	Moscato	25	1.6	sparkling	42	2.4	(no) idea	12	1.6

* Descriptors which indicated that respondents were unfamiliar with the sparkling wine style. In these circumstances, 'none', 'nil', 'na' and 'n' were taken to indicate that no words or brand could be associated with the wine style; 'know', 'never' and 'sure' were associated with 'don't know', 'never tried' and 'not sure', respectively. Consumers were asked to list words and brands that they associated with each sparkling wine style (as many or as few words/brands as desired, but at least one response).

mentioned. Respondents deemed sparkling red wine to be ‘red’, ‘bubbly’, ‘rich’, ‘dark’ and ‘heavy’ with ‘Brown (5.9%) Brothers’ (5.0%), ‘Jacobs (2.3%) Creek’ (2.6%), ‘Seppelt’ (2.3%), ‘Penfolds’ (2.2%) and ‘Yellowglen’ (1.9%) being named. Sparkling rosé was considered a ‘pink’, ‘sweet’ and ‘light’ wine, and ‘Jacobs (7.5%) Creek’ (7.2%), ‘Brown (5.2%) Brothers’ (4.5%), ‘Yellowglen’ (3.1%), ‘Mateus’ (2.2%) and ‘Yellow’ (1.9%) were the most well-known brands. The overwhelming impression of Moscato was that it is ‘sweet’. Nevertheless, positive language was used, including reference to the ‘refreshing’, and ‘delicious’ characteristics of the wine style, which is made by ‘Brown (17.8%) Brothers’ (15.7%), ‘Gossips’ (4.2%), ‘Jacobs (3.6%) Creek’ (3.4%) and ‘Banrock (3.2%) Station’ (2.8%). Consumer knowledge of Prosecco was limited, demonstrated by the high ranking of the words ‘none’ and ‘don’t know’. Some consumers were aware of the style’s country of origin (Italian, 6.4%), but used both ‘dry’ and ‘sweet’ to describe the sensory attributes. The most popular Prosecco brand was ‘Brown (8.7%) Brothers’ (7.4%), whereas other responses within the list indicated unfamiliarity (e.g., ‘none’, ‘don’t know’, ‘nil’, ‘can’t recall’, ‘not sure’ and ‘no idea’).

Of the consumers that had an opinion on the sparkling wine styles, statistically significant differences were observed amongst sparkling wine styles and consumer segments ($p < 0.05$) (Table 4). Enthusiasts consistently preferred all sparkling wine styles more than the Aspirant and No Frills segments. Pairwise comparisons of the sparkling white wine preferences found that only the No Frills vs. Aspirant scores demonstrated a significant difference ($p = 0.010$). All other pairwise comparisons for sparkling white wines were statistically insignificant. Overall, Champagne and sparkling white wine were most preferred (medians = 7.0 for both, IQRs = 4.0, 2.0 respectively), followed by sparkling rosé and Moscato (medians = 6.0 for both, IQRs = 2.0, 3.0 respectively). Surprisingly, Moscato received the highest median scores from the Enthusiast and No Frills segments (medians = 7.0 for both, IQRs = 4.0). Sparkling red wine had a median score of 6.0 (IQR = 3.0) and all segment comparisons for this style yielded statistically significant results ($p < 0.05$). Prosecco was preferred the least by No Frills and Aspirant segments (medians = 5.0 for both, IQRs = 2.0), with statistically significant differences observed between all groups ($p < 0.05$). This result is not surprising when the low level of familiarity with Prosecco is considered. Additional advertising and/or consumer exposure to Prosecco may improve sales of this wine style, given it has been suggested that wines that have been tasted previously seem to be preferred over recommended or prestigious wines [49].

Of the 1027 regular Australian sparkling wine consumers surveyed, only 6.2% ($n = 64$) indicated that they were not familiar with Champagne. In contrast, only 10 respondents were unable to state their preferences for sparkling white wine (Table 5). Overall, 253 (24.63%) consumers were not familiar with Prosecco, 6.6% ($n = 68$) did not have an opinion about Moscato, and only 3.5% ($n = 36$) and 3.7% ($n = 38$) did not indicate a preference score for sparkling rosé and red wines, respectively. In vast contrast to the Enthusiast segment, the No Frills consumers demonstrated the least familiarity with Prosecco ($n = 157$), Champagne ($n = 44$), Moscato ($n = 38$), sparkling rosé ($n = 26$) and sparkling red wines ($n = 25$). Aspirant frequencies for all wine styles, except sparkling white wine ($n = 5$), sat between the No Frills and Enthusiast segments. In summary, the observed trend was that respondents were most familiar with sparkling white wine ($n = 10$) and least familiar with Prosecco ($n = 253$) (Table 5).

Women consistently liked sparkling wine more than men, with the exception being for sparkling red wine (Table 6). Female respondents preferred sparkling white wine the most (median = 8.0, IQR = 2.0), followed by Champagne, sparkling rosé, Moscato (medians = 7.0 for all, IQRs = 4.0, 3.0, 4.0 respectively), sparkling red (median = 6.0, IQR = 4.0) and Prosecco (median = 5.0, IQR = 2.0). Additionally, the median scores provided by women for sparkling white, Moscato and sparkling rosé were all significantly higher than those of men ($p < 0.05$). These findings are consistent with previous research suggesting gender-based interest and/or preference in sparkling wine [45,50].

The younger consumers who participated in this study (i.e., those under 35 years of age), preferred Moscato and sparkling rosé (medians = 7.0 for both, IQRs = 4.0, 2.0 respectively) more than consumers from other age groups. Respondents over 55 years of age (median = 8.0, IQR = 2.0) preferred sparkling white wine the most. Pairwise comparisons between all age categories for sparkling white wine and Moscato identified significant differences ($p < 0.05$). Nonetheless,

Table 4. Liking scores of Fine Wine Instrument consumer segments for different sparkling wine styles.

	1st Percentage Quartile Mean Median 3rd Percentage Quartile															
	All Segments (<i>n</i> = 1027)				No Frills (<i>n</i> = 441)				Aspirants (<i>n</i> = 486)				Enthusiasts (<i>n</i> = 100)			
Champagne	5.0	6.8	7.0	9.0	5.0	6.3	7.0	8.0	6.0	7.0	7.0	9.0	7.0	7.7	8.0	9.0
Sparkling white	7.0	7.3	7.0	9.0	7.0	7.3	8.0	9.0	7.0	7.3	7.0	9.0	7.0	7.5	7.0	9.0
Sparkling red	4.0	5.7	6.0	7.0	3.0	5.1	5.0	7.0	5.0	5.9	6.0	7.0	6.0	6.9	7.0	8.0
Sparkling rosé	5.0	6.0	6.0	7.0	5.0	6.0	6.0	7.0	5.0	5.8	6.0	7.0	6.0	6.9	7.0	8.0
Moscato	5.0	6.0	6.0	8.0	5.0	6.1	7.0	9.0	4.0	5.7	6.0	7.0	5.0	6.8	7.0	9.0
Prosecco	5.0	5.3	5.0	7.0	4.0	5.0	5.0	6.0	5.0	5.3	5.0	7.0	5.0	6.5	7.0	8.0
	Mood Test Multiple Pairwise Comparison <i>p</i> value															
	All Segments				No Frills vs. Aspirants				No Frills vs. Enthusiasts				Aspirants vs. Enthusiasts			
Champagne	<0.0001 *				<0.0001 *				<0.0001 *				<0.0001 *			
Sparkling white	0.035 *				0.010 *				0.645				0.657			
Sparkling red	<0.0001 *				0.002 *				<0.0001 *				<0.0001 *			
Sparkling rosé	<0.0001 *				0.049 *				<0.0001 *				<0.0001 *			
Moscato	<0.0001 *				0.002 *				0.050 *				<0.0001 *			
Prosecco	<0.0001 *				0.015 *				<0.0001 *				<0.0001 *			

Data are the means, medians and quartiles of 9 point Likert scale scores (where 1 = extremely dislike, 5 = neither dislike nor like, 9 = extremely like, and 0 = never consumed). * *p* values at significance level of 0.05.

Table 5. Frequency of Fine Wine Instrument consumer segments' unfamiliarity with different sparkling wine styles.

Wine Type	Frequency			
	All Segments (<i>n</i> = 1027)	No Frills (<i>n</i> = 441)	Aspirants (<i>n</i> = 486)	Enthusiasts (<i>n</i> = 100)
Champagne	64	44	19	1
Sparkling white	10	3	5	2
Sparkling red	38	25	10	3
Sparkling rosé	36	26	8	2
Moscato	68	38	25	5
Prosecco	253	157	88	8

Table 6. Quartile and median liking scores and comparisons of gender, age, education and household income (AUD) segments for different sparkling wine styles.

	1st Quartile Percentage Median 3rd Quartile Percentage																	
	Champagne			Sparkling White			Sparkling Red			Sparkling Rosé			Moscatto			Prosecco		
All segments	5.0	7.0	8.0	7.0	7.0	9.0	4.0	6.0	7.0	5.0	6.0	7.0	4.0	6.0	8.0	5.0	5.0	6.0
Male	5.0	7.0	8.0	6.0	7.0	8.0	5.0	6.0	7.0	5.0	6.0	7.0	4.0	6.0	7.0	4.0	5.0	7.0
Female	5.0	7.0	9.0	7.0	8.0	9.0	3.0	6.0	8.0	5.0	7.0	8.0	5.0	7.0	9.0	5.0	5.0	7.0
<35 years	5.0	7.0	8.0	6.0	7.0	9.0	4.0	6.0	7.0	5.0	7.0	9.0	5.0	7.0	9.0	5.0	5.0	7.0
35–55 years	5.0	7.0	9.0	7.0	7.0	9.0	5.0	6.0	7.0	5.0	6.0	7.0	5.0	6.0	8.0	5.0	5.0	6.5
>55 years	5.0	7.0	9.0	7.0	8.0	9.0	3.0	6.0	7.0	5.0	5.0	7.0	3.0	5.0	7.0	3.0	5.0	6.0
High school	5.0	7.0	8.0	6.0	7.5	9.0	4.0	6.0	7.0	5.0	6.0	7.0	5.0	7.0	8.0	5.0	5.0	6.0
Trade	5.0	7.0	8.0	7.0	7.0	9.0	4.0	6.0	7.0	5.0	6.0	7.0	4.0	7.0	9.0	4.0	5.0	6.0
Undergraduate	6.0	7.0	9.0	7.0	7.0	9.0	5.0	6.0	7.0	5.0	6.0	7.0	5.0	6.0	7.0	5.0	5.0	7.0
Postgraduate	6.0	8.0	9.0	7.0	7.0	9.0	5.0	6.0	8.0	5.0	6.0	7.0	5.0	6.0	8.0	5.0	6.0	7.0
<50,000	5.0	7.0	7.0	7.0	8.0	9.0	4.0	6.0	7.0	5.0	6.0	7.0	5.0	6.0	8.0	4.0	5.0	6.0
50,000–100,000	5.0	7.0	7.0	7.0	7.0	8.0	5.0	6.0	7.0	5.0	6.0	7.0	5.0	6.0	8.0	5.0	5.0	7.0
100,001–150,000	6.0	7.0	7.0	7.0	8.0	9.0	4.0	6.0	7.0	5.0	6.0	7.0	4.0	6.0	8.0	5.0	5.0	6.5
>150,000	6.0	8.0	8.0	7.0	7.0	9.0	4.0	6.0	7.0	5.0	6.0	7.0	4.0	6.0	8.0	5.0	5.0	7.0
	Mood Test Multiple Pairwise Comparison <i>p</i> value																	
	Champagne			Sparkling White			Sparkling Red			Sparkling Rosé			Moscatto			Prosecco		
Both genders	0.129			<0.0001 *			0.053			<0.0001 *			0.000 *			0.193		
All age groups	0.024 *			<0.0001 *			0.397			0.003 *			<0.0001 *			0.000 *		
<35 years vs. 35–55 years	0.048 *			0.038 *			0.252			0.206			<0.0001 *			0.006 *		
<35 years vs. >55 years	0.467			<0.0001 *			0.232			0.001 *			<0.0001 *			<0.0001 *		
35–55 years vs. >55 years	0.011 *			0.003 *			0.88			0.021 *			0.045 *			0.113		
All education levels	<0.0001*			0.676			0.258			0.492			0.013 *			0.001 *		
High school vs. Trade	0.118			0.969			0.692			0.76			0.786			0.747		
High school vs. Undergraduate	0.003 *			0.677			0.618			0.337			0.005 *			0.298		
High school vs. Postgraduate	<0.0001 *			0.283			0.207			0.698			0.379			0.001 *		
Trade vs. Undergraduate	0.142			0.687			0.906			0.183			0.004 *			0.147		
Trade vs. Postgraduate	0.000 *			0.274			0.084			0.915			0.419			0.000 *		
Undergraduate vs. Postgraduate	0.018 *			0.485			0.072			0.179			0.058			0.019 *		
All income levels	<0.0001 *			0.611			0.303			0.911			0.845			0.097		
50,000 vs. 50,000–100,000	0.053			0.273			0.067			0.931			0.759			0.124		

50,000 vs. 100,001–150,000	0.000 *	0.633	0.228	0.839	0.831	0.553
50,000 vs. >150,000	<0.0001 *	0.653	0.643	0.554	0.558	0.018 *
50,000–100,000 vs. 100,001–150,000	0.040 *	0.259	0.661	0.755	0.949	0.381
50,000–100,000 vs. >150,000	0.001 *	0.718	0.355	0.482	0.382	0.19
100,001–150,000 vs. >150,000	0.137	0.626	0.599	0.677	0.448	0.064

Data are the medians and quartiles of 9 point Likert scale (1 = extremely dislike, 5 = neither dislike nor like, and 9 = extremely like). * *p* values at significance level of 0.05.

statistically significant differences were not observed between any of the age groups regarding sparkling red wine. Furthermore, consumers with postgraduate qualifications provided the highest scores for Prosecco (median = 6.0, IQR = 2.0). Whereas Moscato was most popular with respondents whose highest level of education was high school and trade qualifications (medians = 7.0 for both, IQRs = 3.0, 5.0). When comparing the median scores of all education segments collectively, Champagne ($p < 0.0001$), Prosecco ($p = 0.001$) and Moscato ($p = 0.013$) showed significantly different results. In addition, Champagne was the only sparkling wine style that provided significant differences between all income levels ($p < 0.0001$). A significant result ($p < 0.001$) was observed when comparing the lower Prosecco preferences of consumers who earn less than AU\$50,000 to the higher scores of those who earn more than AU\$150,000. Consumers with household incomes above AU\$150,000 preferred Champagne the most (median = 8.0, IQR = 3.0), followed by sparkling white wine (median = 7.0, IQR = 2.0).

The No Frills segment showed females preferred sparkling white wine ($p = 0.002$), Moscato ($p = 0.002$) and sparkling rosé ($p = 0.033$), significantly more than their male counterparts. Male and female Aspirant responses for all styles (except sparkling red wine) were significantly different; with females preferring sparkling white ($p = 0.001$), sparkling rosé ($p < 0.0001$) and Moscato ($p = 0.002$). The preference scores of male and female consumers in the Enthusiast segment were not significantly different for any of the sparkling wine styles (Table S1 (Supplementary Materials)). When comparing the preference scores of individual age groups (i.e., <35 years, 35–55 years, >55 years) within the No Frills segment, significant differences were observed between all the age groups for sparkling white ($p = 0.004$).

Moscato ($p = 0.019$) and sparkling red ($p = 0.020$) wines. Aspirants of different ages also had significantly different preference scores for Champagne ($p = 0.050$), sparkling white ($p = 0.008$), Prosecco ($p = 0.004$), Moscato ($p = 0.001$) and sparkling rosé ($p = 0.007$). Younger consumers (<35 years) preferred Moscato more than older consumers ($p < 0.0001$), and statistically significant results were observed when all Aspirant age groups were compared; younger respondents rated Moscato higher. Only the preference scores for Moscato ($p = 0.007$) and sparkling rosé ($p = 0.014$) were significantly different across all age groups within the Enthusiast segment, where liking reduced as age increased (Table S2 (Supplementary Materials)).

Significant differences were found when comparing the No Frills and Aspirant consumers' preferences for Champagne, according to those who had completed High School with those who had undergraduate ($p = 0.025$, $p = 0.048$ respectively) and postgraduate ($p = 0.016$, $p = 0.001$ respectively) qualifications. Aspirant respondents who had completed postgraduate study also provided significantly higher preference scores for Champagne than participants who had completed a trade qualification ($p = 0.014$). Preferences for Prosecco were higher from those who had finished postgraduate study compared to a trade qualification, for both the No Frills and Aspirant segments ($p = 0.041$, $p = 0.019$ respectively). Enthusiasts who had completed undergraduate education gave lower preference scores for Moscato when compared to High School and Trade School graduates ($p = 0.001$ for both) and Postgraduates ($p = 0.011$). A significant difference between Enthusiast preferences for Prosecco was also perceived amongst those who had been educated at undergraduate and postgraduate levels, where postgraduates preferred the style more ($p = 0.041$) (Table S3 (Supplementary Materials)).

Preferences of No Frills consumers of different income levels showed significant differences for sparkling white wine ($p = 0.012$) and Prosecco ($p = 0.019$). Those with incomes less than AU\$50,000 were significantly different to those earning AU\$50,000–\$100,000 and greater than AU\$150,000 ($p = 0.019$, $p = 0.017$ respectively for sparkling wine and $p = 0.007$ and $p = 0.005$ for Prosecco). In addition, significant differences were observed between the No Frills sparkling white wine preference scores of people who earned AU\$100,001–\$150,000 and AU\$50,000–\$100,000 ($p = 0.031$) and more than AU\$150,000 ($p = 0.021$) (Table S4 (Supplementary Materials)).

When comparing preferences for Champagne across all segments of varying incomes, statistically significant results were observed ($p < 0.001$). In addition, within the Aspirant segment there were significantly different results across all income brackets ($p < 0.0001$). Mood's test showed

that the median Champagne scores were different when comparing Aspirants with incomes less than AU\$50,000 to AU\$50,000–\$100,000 ($p = 0.004$), AU\$100,001–\$150,000 ($p < 0.001$) and greater than AU\$150,000 ($p < 0.0001$). When considering Champagne, a significant difference was also observed for Aspirants earning AU\$50,000–\$100,000 and those with a household income over AU\$150,000 ($p = 0.004$). Aspirants with a household income of less than AU\$50,000 had significantly different preference scores for sparkling red wine to those earning AU\$50,000–\$100,000 ($p = 0.006$). Finally, the Champagne preference scores of Enthusiasts who earn AU\$50,000–\$100,000 were significantly lower than those who earn more than AU\$150,000 ($p = 0.039$). Enthusiasts with an average household income less than AU\$50,000 provided significantly higher scores for sparkling rosé wine, than those who earn AU\$100,001–\$150,000 ($p = 0.021$) (Table S4 (Supplementary Materials)).

3.3. Influence of Occasion on the Consumption of Different Sparkling Wine Styles

The ‘situational purchase context’ is a principal driver behind sparkling wine purchasing [13] and Champagne has been described as ‘the celebration wine’ [10] which Australian consumers typically purchase with the intention of sacralizing events [51]. Anchor and Lacinova found that the second biggest motivation for drinking wine, especially sec or demi sec sparkling wine, was ‘to celebrate something’ [52]. It has been argued that a number of variables are affected by this situational context, including the country of origin effect, the price consumers are willing to pay and perceptions of prestige and luxury [13]. In the current study, when survey participants were asked whether they would consume different sparkling wine styles at a number of pre-determined occasions (identified during focus groups previously conducted by Verdonk and colleagues [45]), the results showed highly significant differences between the ranked medians of the FWI segments for all occasions ($p < 0.05$). Each of the occasions specified showed an increase in the likelihood of consumption as consumer involvement increased (No Frills median \leq Aspirant median \leq Enthusiast median). As argued by Spawton [53], the association of sparkling wine with celebration is a key reason why this style is chosen in preference to other alcoholic beverages. This was supported in focus groups held by Olsen, which revealed that participants perceived sparkling wine to be most appropriate for celebrations [54], and a 2016 study found that Croatian sparkling wine consumers generally associated consumption with specific celebrations [6].

In this study, the Enthusiast segment was most likely to consume every style of sparkling wine at each of the listed occasions (median ≥ 2 , i.e., anniversary, at home with food, at home without food, birthday, breakfast, by yourself, Christmas, during the week, funeral, girl’s/boy’s night out, hot weather, Melbourne Cup, New Year, on the weekend, pub/club, restaurant/café, wedding, work drinks). In fact, the median numbers were above 4 for all wine styles, except Prosecco. These consumers were most likely to drink Champagne, sparkling white, red and rosé wines, and Moscato (median ≥ 5) at an anniversary, at home with food, birthday, Christmas, during the week, Melbourne Cup, New Year, on the weekend, pub/club, restaurant/café, wedding and work drinks (Table 7).

The No Frills segment did not report consuming sparkling red, rosé, Moscato or Prosecco (median = 1) at an anniversary, at home with food, at home without food, birthday, breakfast, by yourself, during the week, funeral, girl’s/boy’s night out, hot weather, Melbourne Cup, New Year, on the weekend, pub/club, restaurant/café, wedding and work drinks. However, the Aspirant group was more likely to consume sparkling red and sparkling rosé (median ≥ 2) at an anniversary, at home with food, birthday, Christmas, New Year, on the weekend, restaurant/café and wedding. Of all the sparkling wine styles, Champagne and sparkling white wine were consumed the most at all occasions, with Enthusiasts consistently providing the highest scores. The highest median values for all segments consuming Champagne and sparkling white wine (i.e., No Frills median > 4.0 , Aspirant median > 5.0 , Enthusiast median > 6.0) were found on anniversaries, birthdays, Christmas, Melbourne Cup, New Year and weddings ($p < 0.001$ for all). Sparkling white wine was also regularly consumed on weekends (No Frills median = 4.0, Aspirant median = 5.0, Enthusiast median = 6.0) ($p < 0.001$) (Table 7).

Pairwise comparisons between the consumer segments showed that the majority (96.5% of combinations tested) of relationships were significantly different. However, statistically significant

[illegible]

Hot weather	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
Melbourne Cup	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
New Year	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
On the weekend	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
Pub/club	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
Restaurant/café	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
Wedding	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *
Work drinks	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *	<0.0001 *

Data are the medians and quartiles of 9 point Likert scale (1 = never, 5 = sometimes, and 9 = always). * *p* values at significance level of 0.05.

2
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differences were not observed between the No Frills and Aspirant segments when comparing likelihood of consumption for sparkling white wine at Christmas ($p = 0.064$) and New Year ($p = 0.066$). The Mood test also found non-significant differences between the No Frills and Aspirant groups for Moscato at the following occasions: anniversaries ($p = 0.062$), at home with food ($p = 0.395$), at home without food ($p = 0.092$), birthdays ($p = 0.121$), by yourself ($p = 0.067$), Christmas ($p = 0.643$), during the week ($p = 0.074$), on a girls/boys night out ($p = 0.560$), Melbourne Cup ($p = 0.056$), New Year ($p = 0.206$), on the weekend ($p = 0.097$), at the pub/club ($p = 0.089$) and at a restaurant/café ($p = 0.333$). Detailed comparisons of each FWI segment at each listed occasion can be found in the appendices (Table S5 (Supplementary Materials)).

3.4. Influence of Price on Consumer Purchasing Behavior

Several studies have identified price as being an important consideration during wine purchasing decisions [53,55–61], with high prices being associated with superior quality [53,59]. Six attributes were found to be statistically important in explaining deviations from average wine prices: quality, cellar potential, grape variety/style, region, vintage and producer size [62]. Lecocq and Visser found that price differences could be explained by characteristics which were directly revealed to the consumer upon inspection of the bottle and its label (ranking, vintage and appellation), rather than sensory variables [63].

The most common sparkling wine purchased by consumers in this study was sparkling white wine priced between AU\$15 and \$29 per bottle ($n = 538$, 52%), followed by Champagne at the same price point ($n = 358$, 35%) (Figure 1). Participants typically purchased bottles of sparkling white at a price less than AU\$30 ($n = 887$, 86%), and fewer than 2.1% ($n = 21$) spend more than AU\$50 per bottle. More people were willing to spend upwards of AU\$30 for Champagne (43%, $n = 441$ typically spending more than AU\$30 per bottle), but only 5.5% ($n = 56$) usually spend more than AU\$80. Approximately 60% of consumers ($n = 631$) never purchase Prosecco, 39% ($n = 401$) do not buy sparkling red wine, 38% ($n = 389$) never buy Moscato, and 34% ($n = 345$) do not purchase sparkling rosé wine (Table 8).

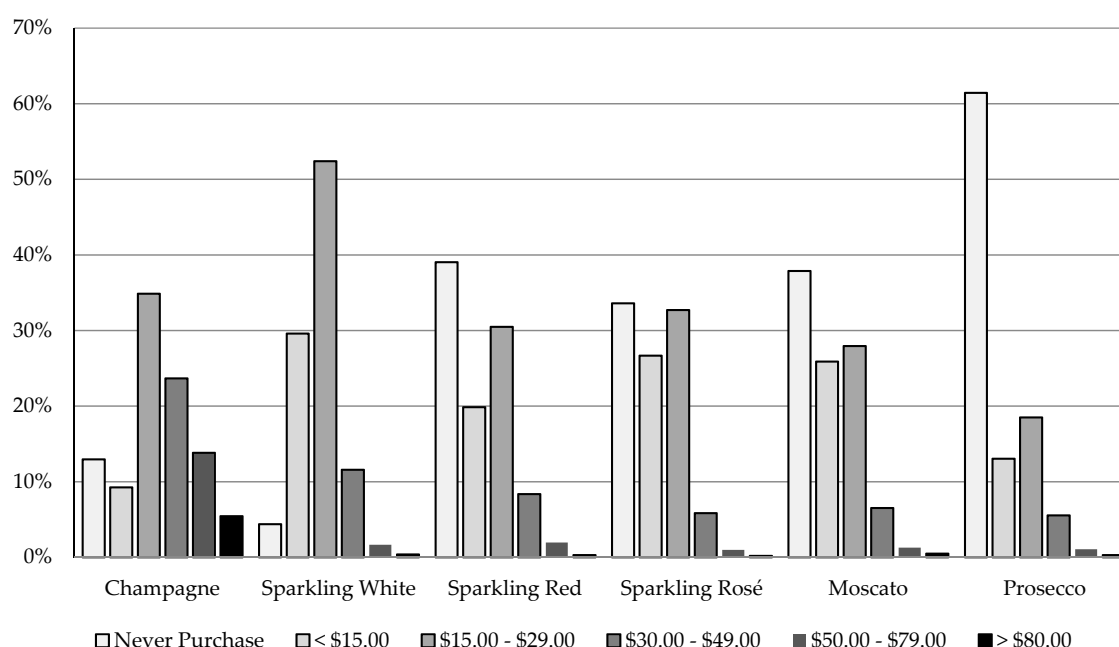


Figure 1. Consumer spending per bottle (AUD) on different sparkling wine styles.

For all considered wine styles, there was a significant association between the consumer segments and the price they were willing to pay ($p < 0.0001$ for all) (Table 8). The No Frills consumers

Table 8. Typical spending (AUD per bottle) of Fine Wine Instrument consumer segments on different sparkling wine styles.

		Frequency Percentage (%)											
		Champagne		Sparkling White		Sparkling Red		Sparkling Rosé		Moscato		Prosecco	
All Segments	Never purchase	133	13.0	45	4.2	401	39.0	345	33.6	389	37.9	631	61.4
	<\$15	95	9.3	304	28.4	204	19.9	274	26.7	266	25.9	134	13.0
	\$15–\$29	358	34.9	538	50.2	313	30.5	336	32.7	287	27.9	190	18.5
	\$30–\$49	243	23.7	119	11.1	86	8.4	60	5.8	67	6.5	57	5.6
	\$50–\$79	142	13.8	17	1.6	20	1.9	10	1.0	13	1.3	11	1.1
	>\$80	56	5.5	4	0.4	3	0.3	2	0.2	5	0.5	3	0.3
No Frills	Never purchase	98	22.2	31	7.0	237	53.7	177	40.1	181	41.0	282	64.0
	<\$15	52	11.8	162	36.7	90	20.4	132	29.9	137	31.1	58	13.2
	\$15–\$29	164	37.2	222	50.3	102	23.1	119	27.0	109	24.7	72	16.3
	\$30–\$49	76	17.2	24	5.4	11	2.5	12	2.7	13	3.0	23	5.2
	\$50–\$79	35	7.9	2	0.5	1	0.2	0	0.0	1	0.2	6	1.4
	>\$80	16	3.6	0	0.0	0	0.0	1	0.2	0	0.0	0	0.0
Aspirants	Never purchase	34	7.0	14	2.9	147	30.3	154	31.7	190	39.1	290	59.7
	<\$15	36	7.4	128	26.3	98	20.2	124	25.5	110	22.6	64	13.2
	\$15–\$29	159	32.7	271	55.8	180	37.0	180	37.0	153	31.5	99	20.4
	\$30–\$49	139	28.6	63	13.0	53	10.9	26	5.4	28	5.8	26	5.4
	\$50–\$79	89	18.3	9	1.9	8	1.7	2	0.4	3	0.6	3	0.6
	>\$80	29	6.0	1	0.2	0	0.0	0	0.0	2	0.4	3	0.6
Enthusiasts	Never purchase	1	1.0	0	0.0	17	17.0	14	14.0	18	18.0	59	59.0
	<\$15	7	7.0	14	14.0	16	16.0	18	18.0	19	19.0	12	12.0
	\$15–\$29	35	35.0	45	45.0	31	31.0	37	37.0	25	25.0	19	19.0
	\$30–\$49	28	28.0	32	32.0	22	22.0	22	22.0	26	26.0	8	8.0
	\$50–\$79	18	18.0	6	6.0	11	11.0	8	8.0	9	9.0	2	2.0
	>\$80	11	11.0	3	3.0	3	3.0	1	1.0	3	3.0	0	0.0
		Fisher Exact <i>p</i> -Value											
		Champagne		Sparkling White		Sparkling Red		Sparkling Rosé		Moscato		Prosecco	
Price vs. Segment Association		<0.0001 *		<0.0001 *		<0.0001 *		<0.0001 *		<0.0001 *		<0.0001 *	

* *p* values at significance level of 0.05.

rarely pay more than AU\$30 per bottle of Australian sparkling wine. When considering Prosecco, Moscato, sparkling rosé and sparkling red wine, at least 40% of the collective cohort do not purchase these styles. The majority of purchases made by Aspirants and Enthusiasts were under AU\$50 and approximately 60% of each of these groups do not purchase Prosecco. The data show that No Frills consumers are most likely to purchase sparkling white wine at AU\$15–\$29 ($n = 222$, 50.3%) and never purchase sparkling red wine ($n = 237$, 54%) or Prosecco ($n = 282$, 64%). Only ~20% of the No Frills segment was willing to spend AU\$15–\$29 on sparkling red ($n = 102$, 23%), sparkling rosé ($n = 119$, 27%) and Moscato ($n = 109$, 25%).

Aspirants typically purchase sparkling white wine priced between AU\$15 and \$29 ($n = 271$, 56%) and most never purchase Prosecco ($n = 290$, 60%). At least 30% of the Aspirants purchase Champagne ($n = 159$, 33%), sparkling red ($n = 180$, 37%), sparkling rosé ($n = 180$, 37%) and Moscato ($n = 153$, 31.5%) at retail prices between AU\$15 and \$29. Proportionally, the Enthusiast group's spread of data for the AU\$15–\$29 and AU\$30–\$49 was the most similar. The results ranged from 19% to 40% for the AU\$15–\$29 price bracket ($n = 35$, 35% for Champagne, $n = 45$, 45% for sparkling white wine, $n = 31$, 31% for sparkling red wine, $n = 37$, 37% for sparkling rosé wine, $n = 25$, 25% for Moscato, $n = 19$, 19% for Prosecco) and between 8% and 32% across all styles in the AU\$30–\$49 category ($n = 28$, 28% for Champagne, $n = 32$, 32% for sparkling white wine, $n = 22$, 22% for sparkling red wine, $n = 22$, 22% for sparkling rosé wine, $n = 26$, 26% for Moscato, and $n = 8$, 8% for Prosecco). Interestingly, only 1% ($n = 1$) of Enthusiasts did not purchase Champagne.

All consumer segments were willing to pay more for Champagne than any other style of sparkling wine. This likely reflects the influence of country of origin and price on consumer perceptions of wine quality [64,65]. Evidence also suggests purchasers are willing to spend more per bottle when wine is purchased for special occasions [49]. Although not specific to sparkling wine, it has been suggested that associating a given wine with an occasion might assist consumers with their purchasing decisions [66].

4. Conclusions

Different styles of sparkling wine (both fruit driven and complex styles) appeal to different segments of the domestic sparkling wine market. In the current study, sparkling white wine and Champagne were the preferred wine styles, followed by Moscato and sparkling rosé wine. However, preference scores for sparkling white and rosé wines were significantly higher for women, than for men, and younger consumers (i.e., those < 35 years of age) preferred Moscato and sparkling rosé more than consumers from other age groups. Men and women liked sparkling red wine equally and Moscato appealed to both No Frills and Enthusiast consumers. Whereas Italian sparkling wines have enjoyed considerable (international) growth in recent years, most of the Australian consumers surveyed did not consume it regularly. In fact, almost 25% of consumers were unfamiliar with the style, suggesting Australian wine producers might benefit from further marketing this style. Perhaps not surprisingly, Enthusiasts consumed all sparkling wine styles, more often, and at different occasions, and were willing to spend more on Champagne, albeit, on average, the majority of respondents do not pay more than AU\$50 per bottle for Australian sparkling wine.

The outcomes of this study can be used by sparkling wine producers to better tailor their products and marketing strategies to the specific needs and expectations of consumers within different segments of the Australian market. This research aimed to address a knowledge gap regarding the categorization of sparkling wine consumers to assist marketers in targeting specific segments of the Australian domestic market. There are several limitations to this study, due to possible sample and self-selection biases of survey respondents. Despite a recruited convenience sample of approximately 1000 Australian regular sparkling wine consumers, it should be acknowledged that the participants may not be entirely representative of the broader Australian sparkling wine consuming population. In addition, the survey required participants to self-report data, which could also lead to accuracy issues. Opportunities for future research include consumer tastings to determine sparkling wine preferences, as well as an exploration of consumers' knowledge of sparkling wine production.

Finally, this study could be replicated in other countries, to determine how cultural influences affect consumer behavior.

Supplementary Materials: The following are available online at <https://www.mdpi.com/2306-5710/6/1/14/s1>. Table S1: Influence of FWI segmentation and gender on preferences for different sparkling wine styles; Table S2: Influence of FWI segmentation and age on preferences for different sparkling wine styles; Table S3: Influence of FWI segmentation and education on preferences for different sparkling wine styles; Table S4: Influence of FWI segmentation and household income (AUD) on preferences for different sparkling wine styles; Table S5: Influence of FWI segmentation on consumption occasions of different sparkling wine styles.

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