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Article

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Exploratory wine consumer behavior in a transitional market: The case of Poland

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Abstract

This paper investigates exploratory behavior among wine consumers in Poland where the country's wine culture is in a state of rapid change. This study investigates the extent to which demographics, values, and wine preferences relate to exploratory behavior.

Data obtained from 198 Polish wine consumers was used in the analysis. Exploratory behavior was measured using the VARSEEK scale adapted to wine. Other measures included the Schwartz Value Inventory, wine knowledge and involvement, and measures relevant for wine purchasing behavior. Demographic variables were also used to profile consumers.

The findings show that Polish wine consumers' level of exploratory behavior is not related to demographics, but is influenced by personal values. The consumers who were most likely to engage in exploratory behavior valued creativity, fun, and risk taking and were less concerned about behaving properly. They also had more global outlook as they were more likely to purchase wine in other countries and desired more wines from regions outside Poland.

The findings are useful for wine marketers when developing strategies for wine consumers in transitional markets based on their unique needs and expectations.

This is the first known research conducted in Poland focusing on wine consumers' exploratory behavior and subsequent wine preferences.

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Keywords: Polish wine market; Consumer behavior; Exploratory behavior; Consumer segmentation

1. Introduction

1.1. Wine culture in Poland

The wine culture of Poland began to emerge with the adoption of Christianity when Mieszko I, the country's first ruler, was baptized in the year 966 (Barford, 2001). Since its religious origins, the country's wine culture has both waxed and waned over time. The first wines consumed in Poland were imported from Hungary, France, Italy and Crete. However, the imported wines were very expensive. Vineyards

planted by the local Christian monasteries soon became the main source of wine in Poland. The first vineyards were established in the vicinity of Cracow (Kraków), (Kosmaczewska, 2008). Further significant cultural development took place within Polish territory in the 14th and 15th century, which was followed by a peak in wine production. Later, in parallel to the political muddle and civil wars of the Middle Ages, wine production declined to a practically non-existent level until the end of 20th century. This period was also associated with climatic changes in Europe, such as the Little Ice Age from 1350 to 1850, which caused grapes to freeze and led to their irreversible damage (Estreicher, 2004; Yiou et al., 2012). In addition, the policy of the three states that partitioned Poland from 1772 to 1918 did not look favorably on winegrowing or winemaking. After World War II came the

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era of communism (1945–1989). Good quality wine was considered an exclusive product, thus its production was not allowed. It was not until 1989 that the situation changed (Dobrowolska-Iwanek et al., 2014).

1.2. The wine market in Poland

In Poland, wine has largely been regarded as secondary to vodka and beer. According to a survey held by the consumer research company Centrum Badania Opinii Społecznej CBOS, approximately 84% of the population over 18 years (legal drinking age in Poland) consumes alcoholic beverages: 47% beer, 30% spirits, and 20% wine (CBOS, 2010). Inexpensive drinks made from a variety of fermented fruits have been consumed, but in recent years, Poles have begun to discover wine made from grapes. Dynamic growth in the wine category is attributable to consumers' greater exposure to and adoption of Western alcohol consumption habits. The rapid expansion of wine category has been facilitated by increasing consumer wealth, changing consumption patterns together with rising awareness and increasing focus on health-related aspects of alcohol consumption (Euromonitor International, 2015). According to Michniak, owner of the Stoccaggio, a model wine shop and bar in Krakow, "Poland presents the highest growth of wine consumers in the European Union. The turn towards wine consumption can be seen everywhere, from the widely present alcohol shops selling low quality, less-expensive wine to the bars and restaurants" (Benakis, 2017).

Since 2004 sales of grape wines have increased by more than a half in terms of quantity, yet there is still a strong potential for further growth. The Polish market remains very small compared to other European countries. In 2013, an average adult Pole bought 7 l of grape wine, spending an equivalent of EUR 30. During the same year, an average adult Czech purchased 21.4 l of wine worth EUR 104. Much higher sales volumes and values per an adult are recorded in Germany, not to mention typical wine-making countries from Southern Europe (KPMG, 2014). A comparison with other European countries and the New World markets such as the US, Argentina, Chile clearly shows that the Polish wine market is at an early stage and has many years of growth ahead before reaching maturity.

It is estimated that there are about 500 different wine brands available to Polish consumers (Winiątywa, 2013). While the number of wine brands in Poland has grown, it is still much less than the almost 8000 wine brands and over 21,000 distinct wines available for sale in US retail establishments (Brager, 2014). Even so, both in the US and in Poland wine can be a very confusing product, and one that creates a segment of consumers that are "overwhelmed" by the amount of choices available to them (Winiątywa, 2013).

1.3. Wine consumption and economic conditions

Smith and Mitry (2007) propose that wine consumption per capita is related to the general economic conditions in a country, as well as the increasing health consciousness of

consumers by switching to beverages containing less alcohol. Poland is a country of over 38 million people with the majority living in cities (65%). Research reveals also that 70% of wine consumption in Poland has been in large cities of Warsaw, Poznan, Wroclaw, and Cracow and also in the economically more developed western part of the country. The percentage of female consumers within the population who prefer to consume wine has reached 56% in comparison to 44% male consumers. The primary reason that women are more regular consumers of wine than men is that they prefer the lower alcohol content and milder taste compared to spirits (CBOS, 2010).

Researchers have also suggested that the drinking habits in EU countries are becoming more similar and wine has made significant advances in beverage preferences and accounts for a third of alcohol consumed in the EU (Smith and Mitry, 2007). Cultural convergence, economic growth, transnational corporations' and international retailers' contribution to globalization of markets in Europe have had positive effects on wine consumption. Along these lines, macroeconomic progress in Poland, leading to higher income and standard of living, has resulted in different consumption habits. Specifically, Polish wine consumers increasingly show preferences for new options and seem to relish the wide variety of styles, varieties, and national origins of wine. The main purpose of this paper is to investigate the different levels of exploratory behavior amongst Polish wine consumers, in order to determine their characteristics and values. This resulting information in the context of transforming Polish wine market may be useful for wine marketers and distributors in developing more focused forms of communication and interaction with the consumer based on their needs and expectations.

2. Exploratory consumer behavior

2.1. Theoretical underpinnings of exploratory consumer behavior

Exploratory consumer behavior is not a new concept in the marketing literature, emerging over six decades ago from the theory of optimum stimulation level (OSL) (Orth and Bourrain, 2005). According to the theory of OSL, consumers seek an optimal level of stimulation from their environment, one that is not too low to become boring or uninteresting, nor one that is too high to be overwhelming and uncomfortable. Berlyne (1960) states that stimulation in the form of novelty and change are inherently satisfying to people, however there is an optimal level of stimulation that differs from person to person. Personal values appear to play an important role in determining a person's optimal level of stimulation, as people who value excitement and are more pleasure seeking and less risk adverse tend to seek higher levels of stimulation, while people who value tradition and security are more comfortable when exposed to less environmental stimulation (Raju, 1980; Schwartz, 1994). A person's optimum level of stimulation and can shift over time, depending on demographic and contextual factors (Agnoli et al., 2011). For example, younger people are

often more likely to take risks associated with adventure or innovation (Reisenwitz and Iyer, 2009). In times of rapid change, older people may turn to traditional values and the stability they represent (Olsen et al., 2016).

The economic and social changes taking place within Poland over the past 2 decades create an ideal context to explore how people's values related to stimulation shape consumption behavior. With OSL theoretical background in mind, it can be posited that as the Polish wine market has rapidly changed from relative scarcity to one with greater choice, younger, more adventurous consumers will take advantage of the opportunities for more stimulation granted from a wide selection of new and interesting wines, while other less adventurous consumers will prefer to stay with a limited selection of well-known brands.

Exploratory behavior occurs when consumers seek greater stimulation by trying new and unusual products and find the process of exploration fun and rewarding. The concept of exploratory behavior can be delineated into the willingness to trying new and innovative products for the first time, and the tendency to switch among a variety of known, familiar alternatives. The former referred to as innovativeness, increases the consumer's exposure to risk of using a previously unknown product, while that latter form of exploratory behavior, termed variety seeking or switching behavior, avoids the boredom that might occur from repeatedly consuming the same product. Both of these two aspects of exploratory consumer behavior relate to product trial and usage. Raju (1980) also includes a third type of exploratory behavior, curiosity-motivated behavior which motivates consumers' information search about new or unfamiliar products. The focus of this research is the first form of exploratory behavior, the search for new wines for personal consumption.

2.2. Exploratory consumer behavior and wine consumption

In the wine marketing literature, research into exploratory consumer behavior is a relatively recent pursuit. One of the earliest wine studies to look at exploratory consumer behavior, found that consumers who engaged in more exploratory behavior, tended to have higher levels of wine consumption (Goldsmith and Hofacker, 1991). A more detailed profile of exploratory behavior emerged when Dodd et al. (1996) showed that variety seekers in the US consulted more information sources, relied more on print media and interpersonal sources of information, and were more likely to engage in product trial activities, such as wine tastings and visiting wineries. They also found that greater variety seekers engaged in more frequent wine consumption, however the authors found that demographic characteristics were not related to variety seeking.

In researching the related concept of wine innovativeness, the tendency for consumers to be the first to try new wines, Goldsmith and d'dHauteville (1998) found similar levels of wine innovativeness in their samples from the United States, Germany, and France. They also found that innovative consumers drink wine more frequently, were more highly

involved in the wine category, and possessed greater subjective and objective wine knowledge.

Segmentation analysis has been a popular approach for identifying attributes of consumers prone to exploratory behavior. For example, two segments of Italian consumers who enjoy tasting new wines were identified, however one segment was more price sensitive and would sample new wines only when on promotion, whereas consumers the other segment enjoyed new wines and was willing to pay more for quality wines (Seghieri et al., 2007). Bruwer and Li (2007) also identified two market segments in Australia where consumers tend to experiment when purchasing wine. Consumers in both segments consumed wine more frequently, preferred red wines, and were also more willing to pay for quality wines.

Olsen et al. (2015), investigating consumers in the southern United States, found that variety seekers are younger, pay more for wine, purchase wine in more locations, prefer more varietals, and consider themselves more wine knowledgeable and involved than the other two segments. In addition, they were more tolerant of risk, and also placed more importance on values associated with creativity and fun.

The relationship between perceived risk and exploratory behavior has often been a focus of research. Consumers may feel there are increased risks associated with purchasing new and unfamiliar wines (Orth and Bourrain 2005), therefore, consumers who are more risk adverse in general may prefer to stay with known and trusted wines. Bruwer and Buller (2013) found that in Japan, there was indeed a link between risk and brand loyalty. Regional knowledge and identification may also come into play with wine brand loyalty. For example, Krystallis and Chrysochou (2010) found that Greek wine consumers were more brand loyal when using selection criteria that emphasized Greek region of origin and grape variety. Further, in a study of Southern Italian wine consumers, Pantano (2011) found that cultural affiliation to a region and concern for purchasing local products influenced wine brand loyalty. Age may also be a factor, as Zhllima et al. (2012) found that in Albania, younger consumers preferred Italian wines whereas older consumers preferred domestic wines.

Taken together, the previous research provides evidence that a consumer's demographics, involvement in and knowledge of wine, and tolerance for risk come together to explain one's level of exploratory behavior with wine, and this in turn influence important aspects of wine consumption behavior.

2.3. Exploratory consumer behavior and the Polish wine consumer

None of the previous studies that researched aspects of exploratory consumer behavior were conducted in a context of rapidly changing wine culture similar to what is occurring in Poland, therefore it is unknown if the findings would be the same. However, aspects of wine consumption have been studied in markets that are experiencing profound change to their wine drinking culture. For example, research on wine consumers in the rapidly growing Chinese wine market

revealed wine to be highly symbolic product of which most consumers had little knowledge. Chinese consumers were preoccupied by making sure a wine's image was seen as desirable and they were concerned about what others might think of them if they made a poor wine choice (Liu and Murphy, 2007). This social risk may also be a factor in Poland as Polish consumers usually drink wine in the company of friends or family at social gatherings, celebrating social occasions and family events (MarketLine, 2014).

Liu and Murphy (2007) suggested that Chinese consumers prefer to stay with a well known and trusted brand as a reflection of their collectivist values. Chinese consumers preferred well-known, expensive French red wines for important public occasions, and less expensive Chinese red wines for occasions with close friends or family (Liu and Murphy, 2007). These findings suggest that consumers in transitional markets such as Poland may see imported products with established reputations as enjoying more prestige and therefore more capable of enhancing the giver's self-image. Domestic products may be viewed as more suitable for casual occasions when their wine choices will not be so heavily scrutinized or visible. On the other hand, Polish consumers may not hold to collectivist values to the same degree as those described in China, and therefore Polish consumers may be less fearful of social judgement in choosing a wine. As long as purchasing a new or different wine does not present an economic hardship, exploratory consumer behavior may give them the opportunity to expand their wine knowledge and enjoyment of a greater selection of wine varieties and styles.

Consumer research was also conducted in the emerging wine market of the Dominican Republic, which didn't begin adopting wine until the 1990s (Hernandez, 2004). Settled by the Spanish, the Dominican Republic was traditionally a beer and spirits country, perhaps due to the warmer climate. Researchers (Velikova et al., 2013) surveyed 482 consumers in the Dominican Republic and found that more men than women drink wine, and that wine drinkers are aged between 20 and 60 years with higher education and income than non-wine drinkers. They primarily purchased imported wine in grocery and liquor stores, with a preference for dry red wines. Though demographic and preference data were gathered as part of this study, exploratory behavior and values were not examined.

Nigeria is also an emerging wine market. Historically most Nigerians drank beer, spirits, and their own local wine made from palm trees. It wasn't until the 1990s that traditional wine made from grapes was introduced into the country. However, the adoption of wine has been positive, with a 7% growth rate in 2015 valued at \$158 NGN billion (Euromonitor International, 2017). A study conducted in Nigeria (Ogbeide and Ele, 2015) found that wine consumers are highly educated with larger incomes than the average consumer, and prefer imported wines. Gender was not significant in this study. Wine purchases were primarily made in grocery and liquor stores, as well as bars and pubs due to a desire to socialize over wine.

Taken all together these studies of wine consumers in emerging markets illustrate some demographic and behavioral

differences, but appear to have some elements in common. These include adoption of wine beginning with more educated consumers with higher incomes. These demographic characteristics may influence their wine purchases as upscale consumers may become less risk adverse, and therefore are more open to adopting new beverages and interested in imported wines.

3. Research questions

The main objective of this study is to examine Polish wine consumers' exploratory behavior. An market segmentation approach is taken as this is a first attempt to analyze consumer behavior in a Polish context. Specifically, the study first considers how demographics and personal values might shape one's willingness to engage in exploratory behavior, and then investigates how a consumer's level of exploratory behavior might impact a variety of wine related behaviors. The dependent variables representing wine related behaviors chosen for this study were selected because wine researchers have demonstrated their usefulness in market segmentation and in crafting marketing communications (Kolyesnilova et al., 2008; Olsen et al., 2015). These behaviors include: frequency of consumption, prices paid for wine, place of purchase, wine involvement and subjective knowledge, and desire for a wider selection of wine in terms of geographic origin and price. The study posits that consumers who are more willing to engage in exploratory behavior will exhibit consumer behaviors associated with a stronger interest in learning about and consuming wine. They will drink wine more often, be willing to pay more for wine, shop at more specialized wine shops, be more highly involved and knowledgeable about wines, and desire a greater number and more unusual wines from which to make their purchases (Bruwer and Li, 2007; Gluckman, 1990; Mueller et al., 2011).

4. Methodology

4.1. Research design and sample

The survey was conducted in Polish language, using Survey Monkey template and the international services of Survey Sampling International, a provider of panel data from different geographical locations. The sample frame was self-reported wine consumers 18 years and older matched to previously reported gender and age information (CBOS, 2010). Data were collected over 3 months in Spring 2016. The target sample were wine consumers from the western part of Poland. This region was selected because it is well developed and growing quickly in terms of wine consumption (CBOS, 2010). There were 202 surveys returned, with 198 providing responses to the exploratory behavior measures. A profile of the sample respondents is presented in Table 1. The sample is similar to the overall Polish market in terms of gender and age distribution. Although previous statistics on income levels of wine drinkers and frequency of wine consumption are not available

Table 1
Sample characteristics.

Variable	N	Percentage
Gender		
Male	95	47.03
Female	107	52.97
Age (Generations)		
Gen Z	17	8.42
Millennials	27	13.37
Gen X	69	34.16
Baby Boomers	64	31.68
Traditionalists	25	12.38
Monthly Household Income		
1000zł and below	10	5.13
1001–2000zł	8	4.10
2001–3000zł	26	13.33
3001–4000zł	40	20.51
4001–5000zł	27	13.85
5001–6000zł	20	10.26
6001–7000zł	7	3.59
7001–8000zł	13	6.67
Above 8000zł	44	22.56
Frequency of Wine Consumption		
Daily	13	6.44
Several times per week	44	21.78
Once a week	32	15.84
Several times a month	50	24.75
Once a month	23	11.39
A few times a year	18	8.91
Less than a few times per year	22	10.89

to compare our sample to, the findings do appear consistent with descriptive reports.

4.2. Creation of the groups for exploratory behavior

With the online survey, respondents answered questions concerning their wine consumption attitudes and behaviors, as well as standard demographic questions. Consistent with recent studies (Olsen et al., 2015), exploratory consumer behavior was measured with the VARSEEK variety seeking scale which was adapted for wine (Table 2). Although the VARSEEK scale was developed with the intent to measure variety seeking, the individual items on the scale best capture aspects of exploratory behavior including curiosity and innovativeness, for example “*I am constantly sampling new and different wines*” and “*I think it is fun to try out new wines I am not familiar with*” reflect an interest in new and unfamiliar wines, not just switching within familiar products. The 7 items therefore were deemed to have content validity for measuring exploratory behavior (Hair et al., 2010, p. 92). All 7 items used to capture exploratory behavior were measured on a five point Likert type scale where 1 equaled strongly disagree and 5 equaled strongly agree. The items showed strong internal reliability with a Chronbach's alpha of .852. Therefore, the responses to the 7 items were averaged to create the exploratory behavior scale. The mean for the 5-point scale was 3.62, and the standard deviation was .712. The scale

Table 2
Measures of exploratory behavior in wine.

Measures for Exploratory Behavior	Mean	Standard Deviation
1. I like to try the most unusual wines, even if I am not sure I would like them.	3.75	.934
2. I think it is fun to try out the wines I am not familiar with.	3.79	.872
3. I like to drink exotic wines.	3.64	.968
4. I like to try wines from different countries.	3.90	.789
5. I am constantly sampling new and different wines.	3.21	1.11
6. I prefer to drink only the wines I am used to. (Reverse scored)	3.32	1.10
7. I am afraid to try wines I have never had before. (Reverse scored)	3.78	1.01

Chronbach's Alpha, .852, $N = 198$

deviated from a normal distribution, with measures of skewness at $-.323$ (normal distribution = 0) and kurtosis at $-.07$ (normal distribution = 3). Therefore, to facilitate further analyses, the scale was divided into approximately thirds, with 73 (36.9%) respondents showing high levels of exploratory behavior (scores between 4.0 and 5.0), 66 (33.3%) in the middle with medium levels (scores between 3.4 and 3.9), and 56 (29.8%) scoring in the low category (scores between 1.3 and 3.1). Once consumers were categorized as high, medium and low on wine exploratory behavior, ANOVA was used to identify differences between the three groups. Duncan's post hoc test was then used to identify where the group differences lie.

4.3. Measures used in the study

The framework for personal values came from the value orientations derived from the Schwartz Value Inventory (Schwartz, 1994). The specific scale items used were developed by Held et al. (2009) and have recently been successfully applied to wine segmentation (Olsen, 2016). Wine involvement was measured using a four-item scale developed by Brown et al. (2006) and later refined by Pratt (2010). The Chronbach's Alpha for the involvement scale was .801 indicating suitable internal reliability for inclusion in this study. Subjective wine knowledge was measured using a four-point scale asking the respondents how they viewed themselves, as a novice, intermediate, advanced or connoisseur, an approach used by Thach and Olsen (2015).

Other measures for wine purchasing behavior were adapted to the Polish context from Olsen et al. (2015). Age was measured using generational categories representing Gen Z 18–25, Millennials 26–33, Gen X 34–45, Baby Boomers 46–63, and Traditionalists, older than 63. Income was measured as monthly household income before taxes in Polish Zloty (zł) with 9 categories starting at 1000zł and below and going to 8000zł and higher. Since education is compulsory until 18 and post secondary education is available for free, all respondents had at least some college experience. The points

Table 3
ANOVA for consumer characteristics and exploratory behavior segments.

Consumer Characteristic Measures	1, High Mean, <i>N</i> = 73	2, Medium Mean, <i>N</i> = 66	3, Low Mean, <i>N</i> = 59	<i>F</i> -Ratio	Sig.
Age (5 generational groups)	3.12	3.25	3.44	1.33	.267
Gender (1 = female, 2 = male)	1.40	1.47	1.55	1.72	.181
Education (5 categories ranging from some college to completed post graduate work)	3.93	3.62	3.64	1.37	.257
Monthly Household Income (9 categories ranging less than 1000z to over 8000z)	5.46	5.08	5.39	1.69	.187

*Duncan Post Hoc Test, No subset differs significantly from the others.

on the scale were some college, college graduate, some graduate work, completed graduate school, and post graduate work. The typical price paid for a standard bottle of wine were measured in 8 categories, starting below 10zł, 11–20zł, 21–30zł, 31–40zł, 41–50zł, 51–70zł, 71–90zł, and above 90zł. The location of purchase asked the respondent how frequently they purchased wine at 8 popular shopping locations; a grocery store, a hypermarket, a wine or liquor store, a winery tasting room, a petrol station, online, and bringing home wine from abroad. A five-point scale ranging from never, rarely, sometimes, often and almost always was used to record the answer. To measure the number of favorite varietals, respondents were asked to indicate which of the 13 popular varietals listed were favorites. They were also allowed to indicate an “other category” and write in favorites not listed on the survey. The number of favorites was the sum of the total and ranged from 0 to 10. To measure respondents desire for different wine offerings, respondents were asked on a five-point scale of strongly disagree to strongly agree, whether they wished for greater variety, wines from lesser known regions, more wines from Poland, more wines from Europe, more non-European wines, and a greater selection of both expensive and inexpensive wines.

5. Findings

5.1. Exploratory wine behavior and consumer characteristics

ANOVA was used to investigate whether the 3 groups with high, medium and low levels of exploratory behavior differed in terms of their age, gender, education and income (Table 3). None of the analyses were significant at the .05 level. Therefore, although demographics are commonly used to describe wine market segments, they appear to not be related to exploratory behavior in a Polish context.

5.2. Exploratory wine behavior and consumer values

The next set of analysis considered whether the three exploratory behavior segments differed in terms of their personal values (Table 4). Four of the ten personal value orientations proposed by Schwartz differed significantly. Consumers exhibiting the highest level of exploratory behavior felt it is more important to be creative, have fun, and enjoy life. They also seek an exciting life and are willing to take risks. Inversely, they do not believe it is very important to behave properly and do not appear to worry about doing things others may deem as wrong. Consumers exhibiting the lowest level of exploratory beliefs were less likely to hold these beliefs, with the medium group for exploratory behavior falling in the middle in terms of their personal values.

5.3. Exploratory wine behavior and wine related behaviors

The final set of ANOVA investigates whether exploratory behavior is related to commonly reported wine related behaviors (Table 5). The analysis for frequency of wine consumption was

Table 4
ANOVA for consumer values and exploratory behavior segments.

Measure of Values (6 point scale where 1 = higher agreement and 6 = less agreement)	1, High Mean, N = 73	2, Medium Mean, N = 66	3, Low Mean, N = 59	F-Ratio	Sig.	Duncan's Post Hoc Test
It is very important to think up new ideas and to be very creative	2.32	2.72	3.37	13.50	.000	Group 1 and 2 from 3
It is very important to have a lot of fun, a good time and enjoy life	2.34	2.77	3.22	10.97	.000	Group 1 from 2 from 3
It is very important to have an exciting life and take risks	3.15	3.88	4.10	9.86	.000	Group 1 and 2 from 3
It is very important to have a lot of money and expensive things	4.47	4.31	4.37	.266	.766	
It is very important to be successful in life and to have others recognize achievements.	2.52	2.82	2.92	1.95	.145	
It is very important to live in safe, secure surroundings	3.10	3.17	2.92	.618	.540	
It is very important to help people and care for the well-being of others	2.49	2.52	2.59	.153	.858	
It is very important to look after the environment and care for nature	2.26	2.45	2.37	.827	.439	
It is very important to behave properly and avoid doing things most people think are wrong	4.03	3.62	3.15	6.98	.001	Group 1 and 2 from 3
Traditions are very important and one should follow the customs handed down through religion or family	3.56	3.26	2.94	1.81	.169	

significant at the 0.5 level. The group with the highest level of exploratory behavior does report drinking wine more frequently, while the group with the lowest level of exploratory behavior drinks wine the least often, and the medium group scored in the middle. Exploratory behavior was not significantly related to the average price paid for wine, nor did it appear to influence the local place where consumers purchase wine. For all three groups, the hypermarket appears to be the most popular place to purchase wine. The one place where consumers with higher levels of exploratory behavior are more likely to purchase wine is from outside the country.

Having greater subjective knowledge about wine as well as exhibiting more involvement with the wine category also distinguished the three groups of consumers. The group with the highest level of exploratory behavior felt they were more knowledgeable and were more involved with wine. The group with the lowest level of exploratory behavior was less likely to report wine knowledge and involvement, and the medium group fell in the middle.

Interestingly, the number of different wine varieties that were reported as favorites did not vary among the three groups. Members of each group reported having 3 to 4 favorite varieties. As might be expected though, the consumers with greater exploratory behavior desired to have many more than 3 to 4 wine varieties from which to choose. They also were more likely to express a desire for wines from lesser known regions.

The three groups were the same in their desire for more wines from Poland, but consumers from segments with greater exploratory tendencies also desired wines from Europe and non-European origins. Finally, the high and medium groups for exploratory behavior desired a greater selection of expensive wines from which to choose, but all three groups were similar in terms of having a greater selection of inexpensive wines.

6. Discussion, implications and conclusion

6.1. Consumer attributes of Polish wine consumers regarding exploratory behavior

The findings from the Polish sample indicate that the standard demographic measures of age, gender, education and income do not relate to exploratory behavior. The nonsignificant findings for gender, education and income are consistent with Olsen et al. (2015), however in the US, younger consumers were most likely to engage in exploratory behavior. In Poland, age does not appear to be a factor. One possible explanation for this difference could be that in established markets such as the US, older consumers have had the opportunity to taste a wide variety of wines when they were younger and eventually settle on a few they most prefer. Because of the limited opportunity for Polish consumers to sample a wide variety of wines in their youth, they are still in the process of exploring the wide variety of wines produced in the world.

Polish consumers who are prone to exploratory behavior, are best described in terms of their values. People who possess a strong desire for more creativity, fun, and excitement in their lives are motivated to engage in exploratory behavior. Looking to the theory of optimum stimulation level for a possible explanation, it appears these consumers are looking for a higher level of stimulation in their environment. Polish consumers who do not seek the additional stimulation may find the vast variety of new wines to be overwhelming. As more wines become available to Polish consumers, marketers may want to address the feelings of those consumers who might feel overwhelmed by too many choices by offering them more information and reassurance during the purchasing process.

6.2. *Wine related behaviors of Polish consumers regarding exploratory behavior*

Polish consumers who exhibit more exploratory behavior appear to be more interested in wine in general. They consume wine more frequently and are more involved in the product category. Not surprisingly then, they also report higher levels of wine knowledge. These findings are consistent with findings from other more established wine markets in Europe, the US and Australia (Olsen et al., 2015; Bruwer and Li, 2007; Dodd et al., 1996; Goldsmith and d'Hauterville, 1998). Marketers attempting to bring new products to market may find it helpful to create activities to engage consumers, such as fun tastings and events. As consumers become more involved and knowledgeable, they may feel more comfortable engaging in exploratory behavior.

One aspect that is different with Polish consumers, is that their level of exploratory behavior does not, for the most part, influence where they purchase wine. The hypermarket was the most popular choice for all three groups, followed by wine stores and discount stores. In the US, consumers most often purchased wines from a grocery store, but those who were higher in aspects of exploratory behavior were more likely to shop at specialized wine shops and winery tasting rooms than those exhibiting lower levels of exploratory behavior. One possible explanation may be the size of hypermarkets allows Polish consumers ample opportunity to engage in exploratory behavior if they choose. Furthermore, hypermarkets are still more pervasive in Poland, though more wine shops are being established as the economy improves (Euromonitor, 2015; CBOS, 2010). The fact that the hypermarkets offer discounted wine prices, and many Poles are still suffering some economic hardships, may also be part of the reason.

The research did identify one type of location where Polish consumers who exhibited exploratory behavior were more likely to purchase, and that was in locations outside the country. Wine has gained in popularity partially due Polish holidaymakers visiting the wine producing countries of Italy, Greece, Spain and France. The growing popularity of Italian and Mediterranean cuisine also encourages many Poles to buy a few bottles of wine during their vacation and bring them home to enjoy with family and friends. Furthermore, there is a

group of Poles who have been working as seasonal workers for years in the vineyards of France, Germany, and other countries (Fiałkowska and Piechowska, 2016). Their exposure to wine in these situations may also be part of the appeal of trying wines from other regions.

Although the number of wines sold within Poland has increased tremendously in recent years, Polish consumers with a tendency toward exploratory behavior are not satisfied with their current wine selections. The findings of this study shed light on some of the new wines the Polish consumers with exploratory tendencies yearn for. Poles do indicate they would like to have more domestic wines to choose from, but so do consumers showing less tendency toward exploratory behavior. In addition, all groups of Polish consumers researched here indicated a similar number of favorite varietals, about 3 or 4, and all groups were equally satisfied with the current selection of inexpensive wines. What sets the exploratory consumers apart is their longing for wines from other countries and less well-known wine producing regions. These additional wines may come from both Europe and outside Europe. The Poles with exploratory tendencies also desire greater selection of expensive wines. In this regard, it appears that their higher levels of wine involvement and wine knowledge have made them aware of the vast number of quality wines that are produced all over the world. It appears the Polish market is ready to expand to accommodate more wine collectors and connoisseurs.

6.3. *Management implications*

British wine critic and Financial Times' journalist J. Robinson indicated that recently and rapidly Poland has been developing a wine culture with the increased of sales by almost 60% in the past 10 years (Robinson, 2017). Wine is fighting to take a serious place in the Polish market and thanks to climate change, Poland is now producing as well as consuming wine. It is too early to talk about a wine-making industry in Poland but there is an increasing number of initiatives promoting local production of quality grape wine. As of 2016, there were around 500 vineyards in Poland. Most of them small (less than 8 acres) and designed for small-scale production (Benakis, 2017) but about 150 of them aspire to become large, serious players on the market (Euromonitor International, 2015). The majority are located in the southern and western parts of Poland, which benefit from warmer temperatures, an optimal amount of sunlight and longer growing seasons than the rest of the country. Since these wineries are mostly unknown outside their region, their success will largely depend on creating demand for premium wines from Polish consumers.

Poles are still not well educated in terms of wine and food pairings, as it not traditional in Polish cuisine. The consumer education process has been clearly noticeable in recent years. According to research conducted by CBOS (2010) more and more wine consumers in Poland actively look for information about wine on blogs and portals as well as on wine book guides. Wineries attempting to reach consumers in the new

Table 5
ANOVA and wine related behaviors and exploratory behavior segments.

Measures of Wine Related Behaviors	1, High Mean, N = 73	2, Medium Mean, N = 66	3, Low Mean, N = 59	F-Ratio	Sig.	Duncan's Post Hoc Test
Frequency of consumption (1 = daily, 2 = several times a week, 3 = once a week, 4 several times per month, 5 = once a month, 6 = a few times a year, 7 = less than a few times a year)	3.45	4.23	4.53	7.21	.001	Group 1 and 2 from 3
When buying wine for home, average price paid . (8 ranges, in zloty)	3.89	3.82	3.64	.599	.550	
Place of purchase- Grocery Store (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	1.89	1.78	1.89	.593	.554	
Place of Purchase- Hypermarket (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	3.38	3.40	3.21	.701	.497	
Place of Purchase- a wine store (1 = never, 2 = rarely, 3=sometimes, 4 = often and 5 = almost always)	2.86	2.97	2.66	1.47	.232	
Place of Purchase – a discount store (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	2.67	2.83	2.81	.397	.673	
Place of purchase- a winery tasting room (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	1.87	2.00	1.81	.875	.418	
Place of Purchase – Petrol Station (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	1.18	1.21	1.23	.121	.886	
Place of Purchase – Online (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	1.56	1.66	2.53	.366	.694	
Place of Purchase – Bring from another country (1 = never, 2 = rarely, 3 = sometimes, 4 = often and 5 = almost always)	2.97	2.60	2.40	5.06	.007	Group 1 from 2 and 3
Subjective Wine Knowledge (1 = novice, 2 = intermediate, 3 = advanced, 4 = connoisseur)	2.05	1.80	1.57	8.29	.000	Group 1 from 2 and 3
Wine Involvement Scale (1 = strongly disagree to 5 = strongly agree)	3.49	3.26	2.84	10.98	.000	Group 1 and 2 from 3
Number of Favorite Varietals (0 to 10)	3.79	3.55	3.12	2.19	.115	
Desire greater variety of wines to choose (1=strongly disagree to 5 = strongly agree)	3.22	2.97	2.56	5.44	.005	Group 1 from 2 and 3
Desire wines from lesser known regions (1 = strongly disagree to 5 = strongly agree)	3.89	3.48	3.15	9.22	.000	Group 1 from 2 and 3
Desire more wines from Poland (1 = strongly disagree to 5 = strongly agree)	3.56	3.35	3.20	1.79	.170	
Desire more wines from Europe (1 = strongly disagree to 5 = strongly agree)	3.78	3.43	3.17	6.26	.002	Group 1 from 2 and 3
Desire more non-European wines (1 = strongly disagree to 5 = strongly agree)	2.98	3.48	2.98	18.98	.000	Group 1 from 2 from 3
Desire greater selection of expensive wines (1 = strongly disagree to 5 = strongly agree)	3.10	2.89	2.54	5.17	.007	Group 1 and 2 from 3
Desire greater selection of inexpensive wines (1 = strongly disagree to 5 = strongly agree)	3.36	3.03	3.03	2.08	.127	

emerging Polish wine market are advised to create web and print content on how to incorporate wine into their lifestyles.

It is interesting to notice, that discount stores are extremely popular distribution channel for grape wines and 44% of wine buyers make their purchases there. Apart from a regular, fairly narrow wine portfolio, discounters very often launch temporary offers of carefully selected wines (like “French week”), targeted mainly at lower and medium price segments, and usually accompanied by well-designed information campaigns playing an important role in consumer education (Euromonitor International, 2015).

KPMG survey predicts two main consumer trends that will impact wine market in the future and shape consumer choices: majority of wine consumers still actively seek the best value for money (in terms of quantity or quality) and hunt for special deals, but there is a constantly growing group of sophisticated and knowledgeable wine consumers, who want to experience more, seek products of higher quality and brands which show the attributes of the premium segment (KPMG, 2014).

They will play a particularly important role for the market of wine in Poland in the near future. Wineries should consider ways to expand their brand portfolio to reach more sophisticated Polish wine drinkers.

7. Limitations and future research

The primary limitation of this study resides in the use of a nonrandom sample. Although the respondents were selected by the sample provider to approximate the gender and age of Polish wine drinking adults, there is no assurance it accurately represents all Polish wine drinkers. Future research should address this limitation so that generalization of the findings is possible. Nevertheless, the study does highlight the need for research on wine consumer behavior to be conducted in a number of different contexts. Transitional markets such as Poland may provide wine firms the opportunity for growth, something which is often more difficult to achieve in saturated mature markets.

In conclusion this research study provides a three-part segmentation of Polish wine consumers based on exploratory behavior. The findings are useful for wine marketers when developing strategies for wine consumers in transitional markets based on their unique needs and expectations. It also provides an overview of some of the emerging trends in the Polish wine market.

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