cellar door

To niche or not to niche?

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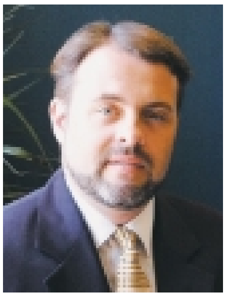

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The unique thing about wine from a competition sense is the sheer number of small brands in the marketplace. Are these wine brands just small brands or are some of these brands effectively niche brands? Surely there is a difference. They can't all be niche brands can they? This paper explores the concept of niching and how it can be applied to small wineries. Particularly, it examines the role of direct marketing and cellar door in creating a true wine niche brand. The paper will add valuable insights for small wineries and also give large wineries some insight into market structure.

A firm has four options in a marketplace;

- be a big brand
- be a small brand
- be a niche brand
- be a change-of-pace brand.

To define these terms, we need to understand the fundamentals of a marketplace. A brand's sales are generated by the number of customers that purchase the product (penetration), multiplied by the amount of product that these customers purchase (purchase frequency). A large body of empirical consumer research has indicated that there is a standard pattern between these two elements (Ehrenberg, 1991). In other words, as brands increase in market share, they have expected customer penetrations and expected purchase frequencies in line with their market share. This is shown in Figure 1.

Brands very rarely deviate from this line. They show standard penetrations and purchase frequencies in line with their market shares. The inelastic shape of the slope in the graph also indicates that larger sales gains come from getting more customers (penetrations), rather than from getting current customers to buy more (purchase frequencies). To grow a large wine brand we therefore need to grow our customer base. This would suggest that traditional marketing to increase awareness and conviction (which leads to purchase) would cost a fortune because of the plethora of wine brands presented to customers. Very few wine companies at the moment have the ability to become relatively large wine brands with market shares over 5%. Our indications at the moment are that there are about five wine brands with market shares over 3%.

Another phenomena is present here that needs explanation, because it leads us to a definition on niche brands. As shown in Figure 1, a brand achieves greater increases in its market share through penetration, than through purchase frequency. It increases in both of these elements, it is just that more of the growth tends to come from penetration; that is that more growth comes from selling to more people that from selling more to the same people.

This is known in marketing literature as the double jeopardy effect because this implies that while brands effectively become

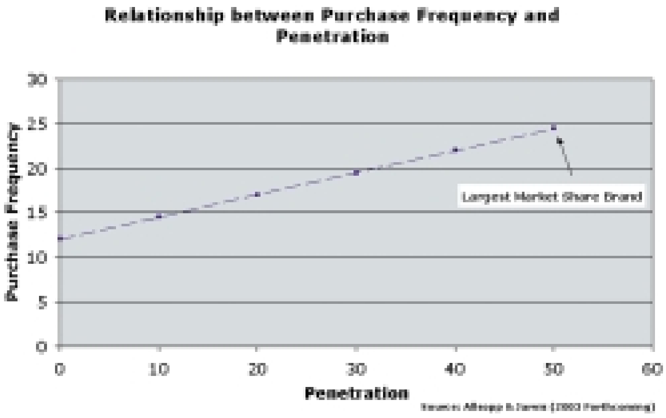

Fig. 1. Relationship between purchase frequency and penetration.

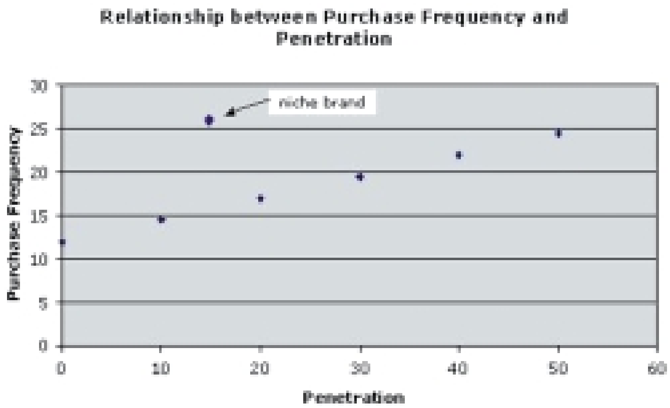

Fig. 2. A niche brand.

bigger because of increases in their penetration (number of customers), they also become bigger because of small increases also in the amount of product that is purchased by these people (their purchase frequencies). The double jeopardy effect refers to small brands that effectively lose out in both of these components.

What this also says is that small brands sit on this line with standard penetrations and purchase frequencies. In other words, it is very difficult to become a niche brand. It suggests that brands will have difficulty creating a true niche brand, i.e. a brand with relatively few buyers (low penetration) but whose users purchase it more often (high purchase frequency). If we were to plot a niche brand on the same graph, it would look like Figure 2.

So a niche brand has higher purchase frequency relative to its penetration. The consumer behaviour literature observes that niche

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brands occur very rarely. This is conflicting with the strategy literature which suggests that marketing programs pursued by firms can lead to relatively more niche brands than would be expected. So we now have some idea of what a niche brand is. We empirically observe that it is usually very rare. Later in this paper we will discuss some practical aspects for at least creating the environment in which it can happen. Now, what about the other type of brand, the change-of-pace brand?

Kahn, Kalwani and Morrison (1988) observe the opposite to niching, which they call “change-of-pace” brands. Once again, the significant marketing literature on the double jeopardy effect would suggest that change-of-pace brands are rare also. Change-of-pace refers to brands that have very low purchase frequencies relative to their penetrations. This relates to the tendency for some customers to begin to seek variety in their product consumption. A change-of-pace brand will only ever capture a limited share of the market. This strategy could also be cost-ineffective because it has to reach a larger customer base through advertising and a large distribution network. Unlike the niche brand concept, the strategy literature (Day, 1990; Kotler, 1991) does not seem to endorse pursuit of a change-of-pace brand.

The wine market

Just by thinking about the wine market, you would expect there to be some niche brands. What we don’t seem to consider is whether there are also change-of-pace brands. You would expect there to be a high proportion of these because of the sheer number of brands in the market and the relative strength of these brands among consumers. Some small brands would have high purchase frequencies and be niche brands, but you would expect some small brands to have very low purchase frequencies and therefore be change-of-pace brands. Initial research conducted by Jarvis, Rungie and Lockshin (2003) on the wine market has indicated this, as shown in Figure 3.

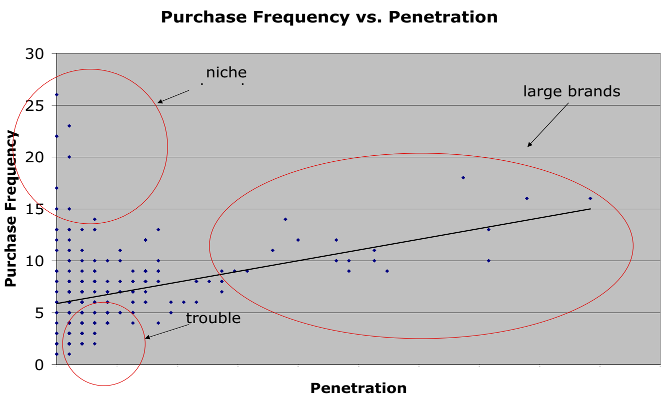

Fig. 3. The structure of the wine market.

This graph shows some interesting phenomena. First, it shows that wine is not behaving like a typical market. It has quite a few niches and some of the niches actually have relatively high market shares. It also shows a degree of change-of-pace brands, brands with really low purchase frequencies relative to their penetrations. Given this, it would be desirable for a small winery to know if:

- its brand is a niche brand
- its brand is a change-of-pace brand.

We would suggest that given the strategy literature, small wineries with change-of-pace brands would battle financially because of the very low purchase frequencies among the people that buy their product. Niche brands are the only survival strategy for small wineries. So what strategies can we adopt to attain a niche?

Product

We do not yet know the attributes that might make up a niche brand. We do not know if niche brands come from predominantly premium regions (i.e. Margaret River) or are based on strong varietals within those regions (i.e. Margaret River Cabernet, Clare Valley Riesling). We do not know if there are strong niche wine brands in Australia that do not rely on premium regions and instead have carved a niche solely on the quality of their product or brand associations. We do not know if niche wine brands have high price, high quality products or if it is based on unique wine varietals (like the strategy adopted by Brown Brothers). When the industry focuses more funds on scientific marketing research we might have the time and resources to find the answers. What we do know is that a niche brand within a retailing setting is very difficult to attain because of what we know about other retail categories. We also know from Figure 3 that some wine brands are change-of-pace brands and if a small winery has its only brand or brands as change-of-pace brands, it would be in a precarious situation.

Interestingly the Australian wine industry’s current situation is that small-to-medium enterprises (SME) winery brands may in fact, from a consumer’s position, be change-of-pace instead of typical small commercial brands. Hypothetically this may signal that the majority of individual SME brands are unsustainable unless they have a commercial wine within the brand offering, and, that SME brands are inevitably unprofitable in the medium-to-long term. Given the sheer numbers of new SME brands and investment decisions based on SME wineries launching new brands, this has ramifications for the industry. This needs funding for research into consumer perceptions and purchase behaviour of SME winery brands; if this change-of-pace scenario is in fact evident it will provide one of the more distinctive strategic directions needed for success in an industry faced with dramatic rationalisation over the next five years.

It may in fact signal why the rationalisation will happen, why it is inevitable given market demand and consumer behaviour rather than just consumption levels and so-called ‘oversupply’ issues. Collaboration and cooperative approaches from a regional base may offer hope through combined resources, reduced costs, reduced ‘unknown’ SME brands in the marketplace, and entry into the commercial wine segment. This highlights once again why funding is needed to research and apply marketing science to the wine-market situation rather than the focus on technical and trade issues.

Usually, a niche brand has something physically unique about it. It is usually related to innovative product design rather than brand image. It could combine an innovative product design plus strong brand associations. To create a niche product, the product has to therefore become the king, but prior knowledge suggests that what is in the bottle is not enough and more uniqueness is required before a true niche position is attained. Options for a niche position could be attained for a wine brand through a combination of:

- very high quality product
- upper end of the market
- a generic product name, not <company name> <region> <varietal>
- very well-defined and consistent brand associations
- make the product rare and exclusive
- proprietary bottle design
- a unique story - of intrigue, ‘romance,’ mystery or hand-loved attention.

A combination of these elements above would in effect offer a brand that would result in higher loyalty. This makes sense if you think about the structure of markets and what it would require to achieve a niche position. We have introduced a new term here, ‘brand loyalty.’ We define loyalty as higher-than-expected purchase frequencies for the brand. For a small niche brand, as discussed earlier this indicates a small customer base buying a lot more of the brand (high purchase frequency). To combine all of the elements above includes significant risk for a small winery. The elements above would involve research and development and in terms of proprietory bottle designs, significant outlays of capital. Another strategic option for the small winery is to effectively create a niche channel. This would allow us to achieve the same thing with perhaps lower risk. We are not telling anyone anything that they are not aware of, but we need to understand how to create a niche before we can create one. A niche channel captures customers who want to be loyal and develops strategies to keep them loyal. A niche channel, in effect, requires the marketer to move to customer relationship management. This is different to marketing within a retailing setting where the focus has to be either on the points above for a niche brand, or on becoming a large brand through strategies designed to increase penetration. If we develop the cellar door and our customer database as a niche channel, where we want customers to be more loyal, we need to undertake relationship marketing.

Place

The cellar door effectively gives the small winery the ideal avenue to create a niche brand. The problem at the moment is that many small wineries take the approach that the product is enough and treat the cellar door as a transaction process. Here's the product: try it, buy it if you feel like it. The onus is nearly entirely on the cellar door visitor to start and develop a relationship. A high proportion of visitors to small wineries are highly involved consumers and the ideal ones for creating a niche position. They have made the effort to get there. Many small wineries, in creating a niche channel, need to move the cellar door from a transaction process to a relationship process.

Hypothetical example

Sheryl is the cellar door manager for a small premium winery in the Clare Valley. The cellar door facility is small, off the main road and while access for cars is minimal, buses can be catered for. The winery can only afford one other staff member on the weekend. Sheryl is tending to a group of four young people who are very keen to learn more about the wines and have driven up from Adelaide for the day. Just as Sheryl is about to discuss the wines and the winery, a bus-load of tourists from a sporting club arrive. They have booked a platter lunch with the winery and are there to have lunch rather than to learn something about the wines. Sheryl, without apology, states to the group of four young people that she cannot give them any more time because a bus has just arrived. The highly-involved, high-consuming group of four leave and when purchasing premium wines at retail level, treat this brand as a change-of-pace brand. The bus-load of tourists, when choosing wines at the retail level, treat the brand as a change-of-pace brand anyway because most of their purchases are from large brands.

In this case, the winery is focusing on exposing as many people to the brand as possible, in a hope of getting more people to purchase when they head home. They are attempting to focus entirely on awareness, rather than building preference and conviction, which could lead to higher purchase frequency amongst a smaller customer base. **They are trying to manage the cellar door like a large brand when they should be managing it as a niche brand.**

In effect, tourism pressures to push people through the cellar door are affecting our ability to form a niche strategy. We propose that small wineries need to start making the distinction between the cellar door as an element of a niche position and the cellar door as a tourism element. Refer to previous articles published in *Grapegrower & Winemaker* by Wade Jarvis for ideas on atmosphere, layout and merchandise (See reference details). For example, small wineries with niche positions need to screen out people who are not there to develop a relationship. They should be making it difficult to get to the cellar door so that those that do make it, are there because they want to try the wines and get on the mailing list. Of course, a niche position at the cellar door still has synergies for tourism. The short fact of the matter is that Tourism and Wine Marketing are two distinctly separate objectives and as such are unlikely to be simultaneously reached through executing just one set of activities and strategy.

Developing the relationship at the cellar door

Large wineries that are aiming to have a big brand, should treat the cellar door as a promotional tool for creating awareness and knowledge for the brand. The focus in the cellar door should be to make it easy for visitors to learn about the brand and the wines. They should aim to put as many people through the cellar door as possible. Location, signage, internal layout, information displays and tastings are the key elements. Small wineries should be focusing on loyalty, and need to identify potential loyal customers and use the cellar door and the database to turn them into loyal customers with high purchase frequencies. Small wineries should make it easy for visitors to develop a relationship. Critical elements are the cellar door staff, the wine products and the atmosphere of the cellar door. This distinction between niche brands and large brands is best shown in Figure 4.

What does the research say about the cellar door?

If we take visitors that purchase wine as those that want to develop stronger relationships, then research by Jarvis and Hoffman (2002) shows that the 25-34 year-old age bracket make up the largest portion of visitors and that this group also has a high proportion that actually purchase wine. See Figure 5.

This group is therefore the ideal group for small wineries to target for a niche strategy. Of course, large wineries need to target everyone. ▸

If we further analyse the differences between those that purchase wine and those that don't, we see a pattern. Basically, if visitors liked the cellar door and rated it highly on a range of criteria, they tended to purchase wine. The major differences in criteria between those that purchased and those that didn't were seen for, "greeted in a friendly and personal manner," "made to feel special during my visit" and "served promptly at the tasting table". This is shown in Figure 6 in the shaded areas. Remember that this is for the total market. What we are seeing is that greeting visitors and making the cellar door personal are loyalty-building strategies, good for niche positions, while serving people promptly at the tasting table helps build brand-liking, vital for large brand positions.

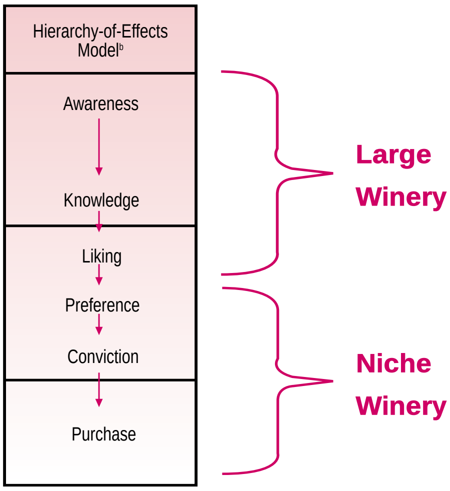

Fig. 4. Goals for the cellar door. Source: Kotler, P, 2003, Marketing Management, Prentice-Hall, USA.

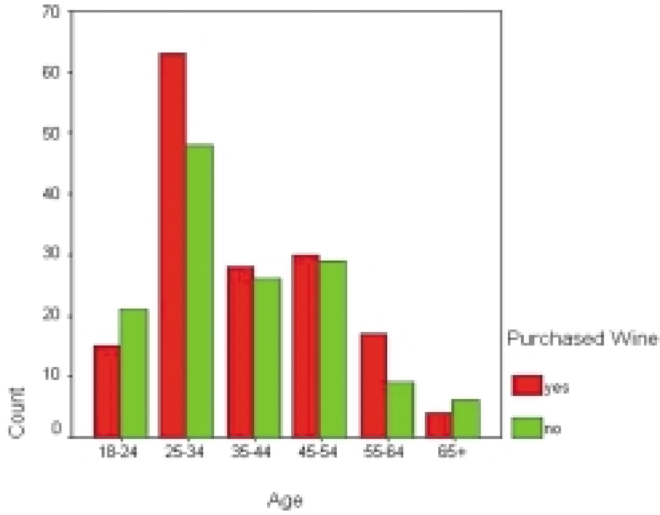

Figure 5: Wine visitors by age group. Source: Jarvis, W & Hoffman, D, 2002, 'What does a wine tourist look like,' *The Australian & New Zealand Grapegrower & Winemaker.* 467:72-77.

Criteria	Bought Wine - Yes or No		Difference
	Yes	No	
	Mean	Mean	
Entrance welcoming	4.26	4.18	.08
Greeted in a friendly and personal manner	4.54	4.22	.32
Made to feel special during my visit	4.21	3.82	.39
Served promptly at the tasting table	4.60	4.27	.33
All wine listed for tasting were available	4.45	4.37	.08
Learnt something about the history of this winery	3.92	4.00	-.08
There was adequate staff to cater for the visitors	4.32	4.09	.23
Easy to move around the cellar door	4.62	4.52	.10
Learnt something about this cellar door's type of wines	4.21	4.06	.15
Learnt something about this wine region	3.82	3.78	.04
Tasting staff were knowledgeable	4.45	4.50	-.05

Fig. 6. Difference in winery evaluations between those that purchased and those that did not. Source: Jarvis, W & Hoffman, D, 2002, 'What does a wine tourist look like,' *The Australian & New Zealand Grapegrower & Winemaker.* 467:72-77.

Direct marketing for a niche position

Direct-marketing offers the winery a profitable pathway to support the continued production of its own wine brand. In addition to the increased margin received and the WET tax rebate the cellar door has the opportunity to build relationships with consumers. Wine is different from most other consumer goods markets where relationships and loyalty have been shown to not quite live up to the hype and promises. Executed well, SME wine brands can position themselves as niche brands as opposed to unsustainable change-of-pace brands. We now introduce some of the key issues and will continue this discussion in papers over the coming issues.

In the first instance the cellar door must establish a way of gaining and developing knowledge about its customers in order to use that to build the niche brand and grow sales. Many wineries' cellar doors will talk of their database, that in actual fact contains not much more than names and addresses with the occasional list of accumulated email addresses. In reality this is not much more than a mail list. A database is what is needed to gather information not just pertaining to contact details but all the data that customers are willing to give. This does not need expensive software or custom-built databases - simple office applications such as Microsoft Excel or Access can suffice.

Customers part with information when they purchase wine - how much they buy, what varietals, and how often, is information that is part of the exchange process. Even without purchasing, if customers are at the cellar door tasting then what they like and what they don't like can be collected and entered into the database at a later time. Over time other vital information can be added such as birthdays or other important dates. As the database grows in information there becomes more opportunities to use the knowledge to execute marketing and sales activities.

For example, one month before you release the next vintage of your flagship red you can use your database to strong effect. Identify lists of all those who purchase this wine in the past or all those who tasted it and liked it at cellar door. Put packs together that include 10 of the new release and two bottles drawn from previous releases. Write a simple, honest, letter addressed to the cellar door customers to inform them that before you release the wine to everyone, you have put packages together for previous customers to enjoy and see how the 1996 and 1997 vintage is looking. A simple mail-merge exercise and hand-signing presents a very targeted, relationship-building offer unique to transacting with the cellar door. To the wine consumer it serves as a thank-you and a reward.

Much the same approach can be taken when there are limited amounts of a vintage for sale. Past purchasers of the specific product can be told that it is running out and before the last is gone the cellar door would like to offer them the opportunity to purchase. Stocks are limited; when it is gone it is all gone. Again this is a reward and a thank you for loyalty and being in a relationship. Obviously this has to be well executed or you can begin to look like the 'rug-store' with a permanent closing end-of-season run-out sale.

Cleanskins are often portrayed as the demolisher of the cellar door brand but they can be used to good effect in the right environment. Positioned and communicated well they offer an opportunity to increase penetration (new customers) and purchase frequency (same customers buying more). For new customers they have a reduced risk premium to buying wine from a brand they have not purchased. Humans are typically risk-averse and an unknown brand represents uncertainty. Cleanskins let new purchasers begin a relationship, try the quality and become accustomed to buying from the cellar door in dozen lots. They join the database and begin to have information built about them. Existing customers can have a 'thank-you for your business, here's something special' note with a cleanskin offer. We have seen this used without damaging the labelled offering - in fact we have seen it grow the sales of labelled wine. It serves to increase the frequency of purchase and consumers can begin to enjoy SME winery 'brands' on Monday to Thursday nights. Do the math. There are a lot consumers that can't (or won't) spend $15 on a bottle four times a week - people give up smoking because of the cost at about the same amount! The SME:Large winery position will see SME wine become unsustainable change-of-pace brands purely because of disposable income. Hence the need to move and build niche brands and try to offer something within the brand range that moves toward commercial demand without damaging the niche position. In other words, have a small brand (cleanskins) and a niche brand (your proprietory brand).

We have seen in practice this purchase behaviour move through the brand offering so that consumers are purchasing 4-5 cases of cleanskin and one case of labelled product for "Saturdays and special occasions." From a consumer's view this allows the total number of bottles to be aggregated and then divided by the total price in order to (subconsciously) work out the value proposition. Essentially what you are beginning to offer is a 'commercial' brand within your range and then your labelled wines become either change-of-pace or hopefully, over time, niche brands. In subsequent articles we will discuss different ways to approach this, techniques we have seen used, and simple activities that we have worked to implement as part of the marketing strategy.

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New region celebrates launch

The Southern Flinders Ranges will celebrate its entry into the Register of Protected Names with a special event to launch the geographic indication and announce the official opening of Remarkable View Wines cellar door.

Flinders Wine & Food is being held on October 26, 2003 at Remarkable View Wines in Murray Town approximately 260km north of Adelaide.

Malcolm Orrock, proprietor of Remarkable View Wines and vice chairman of the Southern Flinders Winegrape Industry Council said the new Southern Flinders Ranges region comprised 900 acres of vines with 20 grapegrower members between the Mediterranean Plains near the Spencer Gulf, to the elevated 350m to 600m on the east side of the Southern Flinders.

Orrock said the combination of history, topography, climate and soils made the Southern Flinders Ranges a unique viticultural region.

"The majority of the vineyards lie between 40m and 500m with more than 90% of the region higher than 300m in elevation," Orrock said.

"The Southern Flinders Ranges is warm-to-hot on the scale of wine-producing areas. This climate and relatively low rainfall reduces the disease pressure and allows for the reliable achievement of high maturity grapes. This enables the consistent production of a wide range of quality distinctive winegrape varieties from one vintage to the next."

The Southern Flinders grapegrowers, in conjunction with Remarkable View Wines, have planned a day of gourmet foods, fine wines and music to celebrate the launch.

Prominent wine writer Philip White will launch the Southern Flinders Ranges Geographic Indication, while the official opening of Remarkable View Wines cellar door will be performed by Tanunda's Peter Lehmann.

Further information on events at Flinders Wine & Food 2003 is available from Malcolm or Karen Orrock at Remarkable View Wines on (08) 8667 2223 or email wines@remarkableview.com.au

New cellar door for Granite Belt

The newest addition to Queensland's Granite Belt wine region, Pyramids Road Wines, has been officially opened by Angelo Puglisi of neighbouring winery, Ballandean Estate.

Pyramids Road Wines is run by Warren and Sue Smith, who hand-make their wines using grapes from their own vineyard as well as fruit from local growers.

"We are set up to produce small batches of high quality boutique wines," said Warren Smith.

"We have been well supported by the local wine community. Angelo Puglisi and his Ballandean Estate team, in particular, have been very supportive through our early stages, helping us with advice, lending equipment and selling us grapes.

"It has been a steep learning curve but one which we have been supported through every step of the way. What we have now as a result is something which we are very proud of and are ready for the public to enjoy."

The Smiths purchased their property in June 1999 and planted grapes in November the same year. Their first vintage from their own grapes, 2002, is still in barrel.

Pyramids Road's cellar door is a renovated packing shed which features a viewing area of the winemaking facilities in the adjacent shed. The facility lends itself to small conferences and catered functions.