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Great wine from the great white north? Producer's product positioning and marketing mix for Canadian icewine

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ABSTRACT

Icewine is a sizable niche in the Canadian wine industry that has attracted little attention from marketing and branding researchers. A first step in understanding the marketing mix and brand positioning strategies was to develop a modified Aesthetics and Ontology (AO) framework to classify consumers of luxury wines and spirits specifically focused on icewine. This paper examines where Canadian icewine producers place their brand and consumers within this AO typology. The authors applied a thematic analysis approach to categorize five semi-structured interviews with representatives of Canadian icewine producers. The modified AO framework was applied to the findings to assess the positioning of the respective icewine brands. The analysis uncovered decidedly homogenous approaches to the positioning and marketing of Canadian icewine. Most purchasers were regarded as novices, with the largest portion of purchases occurring at duty free retail locations; on-site winery experiences comprise a secondary channel. Applying the modified AO framework, the predominant customer group was identified as the 'carouser'. Product variances, pricing strategies, and product packaging were comparatively minor. This homogenous approach to branding and marketing mix should be further explored to understand the potential for alternative and distinct positioning methodologies for Canadian icewine producers.

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Branding; wine marketing; icewine; wine brand positioning; typology; travel retail

Introduction

Canadian table wines have been relatively unknown in the wine industry, with Canada accounting for a mere 0.5% of a global production of 28.4 billion litres (CVA, 2018). Icewine is a niche luxury product that has become synonymous with Canada in recent decades (Dorozynski, 2011). The relative prominence of the product in Canada stands in contrast with a limited academic literature, especially in relation to the business aspects of icewine production, marketing, and branding.

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Background

Icewine is produced by extracting and fermenting juice from grapes naturally frozen while still on the vine. It is widely accepted that eiswein (or icewine) was discovered in Germany in the late eighteenth century when an early frost froze the riesling grapes that were still hanging on the vine. Vintners attempted to salvage the harvest by crushing the crop, resulting in an extremely concentrated and sweet wine (Bowen, 2010). Europe's production has remained low due to the absence of consistent low winter temperatures (Diggs, 2011). Canadian conditions, however, are more reliable, which has led to icewine becoming an iconic product for Canadian vintners. In just over three decades, icewine in Canada has progressed from a fledgling, experimental industry to dominating the world market of this luxury product. In some recent years, 100% of the world's authentic icewine has been produced in Canada. In more typical years, the Canadian share is around 90% (Csanady, 2015). Canada's unique climate and a focus on quality has served to place Canadian icewine producers on a successful trajectory.

From its first steps in 1973, undertaken by Hainle Vineyards in British Columbia's Okanagan region, the icewine industry in Canada grew to international acclaim with a Grand Prix d'Honneur at the 1991 Vinexpo (Jones & Hirasawa, 2008). By 2015, the industry was exporting over 234,000 litres of icewine annually (CVA, 2018). The value of icewine to Canada is underscored by the fact icewine accounts for just 0.3% of wine export volume, yet contributes 25% of the export value generated by the Canadian wine industry.

Despite contributing one quarter of Canada's export wine value, little attention has been paid to understanding the positioning or marketing mix that has underpinned this success. Further, it is approaching two decades since the most cited works on the topic were published (e.g. Hashimoto & Telfer, 1999) and these publications therefore have not considered the impact of recent market changes, namely the decline of sales to Japanese tourists and the more recent decline of sales to Chinese buyers in Canada. These shifts in consumer groups, together with the enduring importance of icewine to overall Canadian wine exports, highlight the need for renewed research on the positioning and marketing of Canadian icewine.

Literature review

Brand positioning frameworks

The positioning of a brand has long been acknowledged as a core branding activity (Romaniuk, 2001). Numerous researchers have defined brand positioning as an association of a brand in the mind of customers relative to its competitors in a way that enables sustainable competitive advantage (Gwin & Gwin, 2003). A firm's brand positioning strategy increases the customer's perception, gaining competitive advantage and strengthening superiority or value over other brands (Aaker, 1996). Hence, companies must identify their brand capabilities in order to become a potential source of competitive advantage and build a strong brand positioning around their own capabilities (Beverland et al., 2007).

Aaker (1996) places brand position within a brand implementation system, with a brand positioning statement detailing the parts of the brand identity to be implemented.

Keller's (1993) integrated brand planning model ties brand positioning to a brand resonance model, which in turn drives a brand value-chain model. Much of the research has focused on empirical testing of Keller's and Aaker's models and related constructs such as brand identity (Malik et al., 2016; Romaniuk, 2001). Kuhn et al. (2008) tested the applicability of Keller's (2003) consumer-based brand equity pyramid in a business to business (B2B) setting. Their findings highlighted discrepancies in the applicability of Keller's (2003) consumer-based framework to an industrial market. Romaniuk (2001) also drew into question the generalizability of Aaker and Keller's models across all industries.

While Aaker and Keller's respective models are the most widely cited in twenty-first century brand positioning research, they are not the only frameworks. Narrative branding positions a brand through telling a narrative or story. Without a focus on benefits and attributes, the five elements of narrative branding – brand story, consumer journey, visual express for the brand, sensory engagement, and role of the brand in consumers' lives – centre on the customer and creating emotive connections (Ringer & Thibodeau, 2007 as cited in Kotler & Keller, 2006). A similar approach is Holt's (2004) cultural branding, which describes a long-term approach where cultural symbolism and deeper cultural perspectives are systematically applied to position a brand as iconic. These broader views may be considered especially useful in the context of luxury brands, which form the focus of our research.

Luxury brand positioning frameworks

In 2017, the global market for luxury goods grew by 5% to nearly €1.2 trillion, led by sales of luxury cars at €489 billion (D'Arpizio et al., 2017). Luxury food and wine rose 6% year over year, with spirits growing faster than wines (D'Arpizio et al., 2017). With luxury goods forecasted to continue an upward growth trend, there is huge opportunity for luxury brand marketers.

Traditionally, income and price have been viewed as the primary drivers of what goods an individual can and will purchase, and for many products, this is true. For goods such as appliances, cars, and education, the decision to purchase one brand over another is largely driven by the cost of the purchase and the income of the purchaser (Dubois & Duquesne, 1993). Following this logic, it would not be a jump to posit that luxury goods are the domain of the wealthy; and income should play a dominant role in segmenting the luxury market. This, however, would be a misleading statement as it neglects to take into consideration the cultural and social aspects of why consumers purchase luxury goods (Dubois & Duquesne, 1993).

It is important to differentiate a premium good from a luxury good. Dion & Arnould (2011) define premium goods as those that are end-range products and have better quality and higher prices than traditional goods, but still lack other characteristics reserved for luxury goods. For example, Phau & Prendergrast (2000) assert that luxury brands are characterized by those that '(1) evoke exclusivity, (2) a well-known brand identity, (3) increase brand awareness and perceived quality ... and (4) retain sales levels and customer's loyalty' (p. 124). The authors use these characteristics to extend the notion of the 'Rarity Principle'. That is, if everyone owns a particular 'luxury' brand, it ceases to truly be a luxury brand. Other authors have defined luxury using further characteristics such as quality, exclusivity, history, and sensuality (Kapferer, 1997). The characteristics view of

luxury goods, however, still often overlooks social and cultural aspects that provide context for what constitutes luxury.

In fact, culture and social aspects play an important role in determining what is luxury and why one would purchase a luxury good. Dubois & Duquesne (1993) find that individuals with a positive attitude towards cultural change are more likely to purchase luxury goods than those who prefer the status quo. Further, the authors posit that luxury goods can satisfy ‘hedonic’ purposes, finding that individuals may purchase luxury goods for simply symbolic reasons rather than for reasons of quality. Others, the authors contend, purchase luxury goods as an extension of their personality via possessions.

Berthon et al. (2009) also see luxury goods as more than just a collection of characteristics. Luxury is a concept that is deeply tied to both social and individual contexts, as well as the material value the product brings. Luxury brands thus have three distinct and inter-related dimensions: Experiential (what a brand means to an individual), Symbolic (what meaning the brand takes on in a social context), and Functional (the physical attributes the brand possesses). Building on this, Berthon et al. (2009) define a typology of luxury brands, based on the two dimensions of aesthetics and ontology, arguing that each quadrant on the two-by-two matrix can represent a different market for the same luxury good: the Postmodern (those who love the ‘latest hot thing’), the Wabi sabi (those who view luxury as ephemeral), The Modern (commercialized luxury), and the Classic (experts who fully appreciate the special quality of a luxury item). We will utilize this framework as a basis for our empirical work, as previous adaptations by J. Paschen et al. (2016) and de Fauconberg et al. (2018) have demonstrated its particular suitability to the purpose.

Scholarly literature on positioning icewine in Canada

In scholarly literature, icewine has been well represented in articles that focus largely on the product and its creation, covering aspects of viticulture, oenology, and sensory experiences (Chamberlain et al., 1997; Pigeau & Inglis, 2007; Rolle et al., 2010; Synos et al., 2015). In addition, there is a sizeable body of work that examines the unique economics of icewine production. Risk management is a particular focus here, as the requirement to leave grapes hanging on the vine for months longer than regular table wine introduces additional risks to growers and vintners (Cyr & Kusy, 2007; Turvey et al., 2006).

In the wider management literature, however, icewine has received comparatively little attention. There are few exceptions, which curiously seem to focus mostly on Inniskillin winery. Most notably, this would be a Harvard Business School case study by Jones & Hirasawa (2008) on Inniskillin and the globalization of icewine, and examinations of Inniskillin’s strategy of marketing exclusively to the niche market of Japanese tourists by focusing on a well-known culture of gift-giving and souvenir shopping (Hashimoto & Telfer, 1999; Teller & Hashimoto, 2000). The lack of broader literature on icewine is surprising in the face of the previously described significant volume and revenue growth of this specialty product, as well as its importance for Canada’s wine exports. It is similarly noteworthy that icewine has not been included in the conversation about wine as a luxury good, even among wine scholars, although it is widely perceived as luxury by wine producers, merchants, and consumers (Lee, 2013; Lois, 2015). These different perspectives, and the lack of attention icewine has received in academic discussions of luxury wines, motivated our

empirical investigation into how icewine producers position their products as luxury items. Continuing previous work by U. Paschen et al. (2017), the current research intends to address a part of the identified gap.

Model

Modelled on Berthon et al.'s (2009) aesthetics and ontology framework for luxury brands, J. Paschen et al. (2016) have adapted a typology specifically targeting the luxury wine and spirits market, with a particular emphasis on icewine. Their framework divides the novice from the expert in the aesthetic dimension, while it differentiates transience and endurance in the ontological dimension. These two dimensions yield classifications for four distinct consumer groups: *Carousers* register as novices in the aesthetic dimension, while the ontological mode underscores the transient. In this category, customers lack the requisite knowledge to genuinely appreciate luxury wines or spirits, but they do relish the status conveyed by the extravagant goods they are consuming. *Cabinet collectors* are novices as well, but the ontological mode highlights the enduring. Like carousers, cabinet collectors usually do not have a genuine appreciation for luxury products, but they are affluent enough to gather a collection of 'conspicuous possessions' (Berthon et al., 2009, p. 52) in their wine cellar – notwithstanding the fact that bottles may be kept incorrectly or not even be appreciated by its owner.

Contrary to the two previous types, the *connoisseur* is a subject matter expert and a veritable consumer whose behaviour emphasizes the transient. Wine connoisseurs are the example in this quadrant most relevant to this paper; they are oenophiles who savour everything about the consumption of wine – from the first uncorking, through a full sensory examination of colour hues, bouquet, and taste by swirling, smelling, and sipping, to finally sharing their thoughts on it. In short, connoisseurs are much more interested in the pleasure they derive from the wine than the prestige. Lastly, the *cellar collector* also possesses expertise, but the ontological dimension stresses the enduring. The same as connoisseurs, they hold a profound reverence for fine wines, but rather than appreciating them as a momentary enjoyment, cellar collectors believe in the lasting value of their collection, either for own consumption in the future, or as an investment. J. Paschen et al. (2016) have demonstrated how this typology can be specifically adapted to identify icewine customer segments and have additionally suggested several possible adjustments to the marketing mix of icewine which would help enhance the way each target segment is focused on.

Method

Data collection

Our study examines how icewine producers position icewine as a luxury product. Given the exploratory nature of our inquiry, we deemed a qualitative research approach best suited for our investigation. Qualitative research is often used to understand 'complex issues that may not be immediately implicit in surface responses' (Goulding, 2005, p. 301). It allows researchers to go deeper into issues of interest and explore nuances related to the problem at hand.

Semi-structured interviews with five Canadian icewine makers located in the Niagara-on-the-Lake region, Ontario, were conducted. Careful consideration was given to the choice of icewine producers: not only did the five companies interviewed represent a sizeable share of the Canadian icewine market, they also encompassed different types of business models. This breadth allowed us to examine similarities and differences in how producers market their icewine in the context of luxury. Interviews were conducted with senior representatives from:

- Peller Estates Winery, a publicly traded company, with more than 50 years of winemaking history (*Andrew Peller Limited – Corporate overview*, 2015).
- Inniskillin, at the time of the interviews a brand owned by US-based Constellation Brands. Constellation is a publicly traded, multinationally active company, billed as the ‘#1 premium wine producer in the world’ (*Constellation Brands – About us*, 2015).
- Mike Weir Wines: Professional Golfer Mike Weir founded the company in 2005 out of a personal love of wine and to raise money for the Mike Weir Foundation, dedicated to advancing the welfare of children in Canada (Stanley, 2014).
- Chateau des Charmes: This family-owned estate winery is based on seven generations of winemaking background, brought to Canada from France when Paul Bosc and his family relocated here in the 1960s (*Château des Charmes*, 2015).
- Henry of Pelham: The winery is a second-generation family-owned estate winery, operated on lands that have been in the family since the late eighteenth century. Three brothers are the current proprietors and have fully embraced current trends from sustainable viticulture to extensive presence on a variety of social media platforms (Henry of Pelham, 2017).

The interviews were conducted either over the phone or in-person. Each interview lasted approximately one hour and was audio-recorded, with specific permission granted by all interviewees to use the non-anonymised data in further research and publication. The interview topics covered were: (i) icewine as a luxury good; (ii) icewine product range; (iii) icewine demand/consumption; (iv) icewine consumers; (v) icewine industry. A professional transcription service transcribed the audio-recordings into MS-Word files. The research team reviewed a sample of the transcribed interviews, compared them word-for-word with the original audio data, and concluded that the text files represent an accurate transcription of the audio files.

Data analysis

For the analysis of the data collected in the five interviews, we deemed a thematic analysis approach appropriate, as the method enables a search for themes by recognizing patterns within the data (Fereday & Muir-Cochrane, 2006). Following Braun and Clarke (2006), we employed thematic analysis as a realist method to organize and describe our data set in rich detail.

In our analysis, we used the deductive approach outlined by Crabtree and Miller (1999) and followed the phases of thematic analysis as described by Braun and Clarke (2006). The first stage of analysis consisted of an in-depth immersion into the data, including a detailed revision of the transcripts to ensure accuracy between the audio recordings

and their written equivalent, at the same time constituting a first interpretative act (Lapadat & Lindsay, 1999). The aim then was to generate initial codes that were subsequently collated into themes, which were mapped into thematic maps. These initial themes were then reviewed on two levels: the first review occurred at the level of the coded data extracts to verify if the themes formed coherent patterns. The final review substantiated that the themes reflected the meanings evident in the dataset as a whole. Lastly, the themes were defined and named in the context of J. Paschen et al.'s (2016) modified AO typology. The outcome of this analysis is presented in this paper.

Findings

The in-depth interviews that were conducted as part of this research ended up uncovering approaches to positioning and marketing Canadian icewine that were remarkably consistent among the group of interviewees, largely irrespective of the size of the company the individuals represented. All had chosen the travel retail market, and more specifically airport-based duty-free stores, as their principal distribution channel. The generally accepted view of the average retail customer in this sales channel was that most buyers of icewine were considered novices that did not have any significant knowledge about wine in general or icewine in particular. A substantial share of the product was assumed to be intended as a gift for a third party, most often a colleague, social, or business connection of meaningful importance to the actual purchaser of the icewine. This is assumed to generate considerable involvement on the part of the purchaser (U. Paschen et al., 2018), while the purchaser was regarded as an intermediary between the interviewed producers and the ultimate consumer of the icewine. This caused all interviewees to acknowledge that they had limited understanding of the possible positioning of the actual consumer on the aesthetics scale of the framework, i.e. none of the producers knew whether the person who would end up drinking their product would be an expert or a novice.

A secondary sales channel that all companies utilized was that of estate or winery-direct sales. All wineries offered culinary experiences through either permanent or seasonal restaurants, as well as wine-themed event locations with wine-oriented catering and some sort of on-site retail store. Across respondents, an important goal of these activities, apart from establishing the connection with the wine's terroir to authenticate the complete wine experience, is educating the consumer. Introducing icewine with a range of uses, perfectly served and delightfully paired, is a well-defined effort to move consumers from novice to expert on the aesthetics scale that is common across all interviewees. Additional efforts to further the knowledge of customers were carried out in varying degrees of intensity and focused on tastings, retail staff training and on-site events in the travel retail stores that carry icewine of the represented brands. The spectrum here ranged from occasional support of staff training or sampling activities to having full-time staff employed by the winery present at the point of sale in various airport locations. Only some interviewees undertook comparatively limited efforts to address existing experts, like star sommeliers or Michelin-starred restaurateurs.

The ontological dimension of the AO typology was largely defined by the physical characteristics of icewine as described by the interviewees. Among them, consensus surfaced that icewine substantially alters its attributes through prolonged periods of

cellaring. It loses its original crisp and fruity nature, transforming into a darker liquid with heavier notes that are not generally associated with icewine. After a period of storage that was generally estimated to be around five years, icewine would more closely resemble classic fortified dessert wines, such as Port, Sherry, Madeira, or Marsala. While the interviewees acknowledged that this changed quality of aged icewine is not considered a defect among experts, it was commonly assumed that this transformation would be regarded as undesirable by consumers. Consequently, transience as an aesthetic mode was considered to be an almost inherent attribute of icewine, offering little opportunity to cellar it for more than five years and thereby preventing the targeting of collectors as a positioning strategy. In summary, the icewine producers that were interviewed for this research targeted predominantly carousers as identified in J. Paschen et al.'s (2016) modified AO typology. The efforts to appeal to or create connoisseurs were limited.

Following a similar trajectory, the different brands represented in our research sample also employed a very similar marketing mix to position their products and brands in the marketplace. Variances in product between the different wineries were comparatively minor, and would be perceptible mostly to an expert audience. All offered a standard set of icewines based on vidal, riesling, and cabernet franc grapes, which are varieties that are commonly used for the production of Canadian icewine. Vidal is regarded as a benchmark product, because this resilient grape forms the basis for the bulk of the icewine volume. Riesling and cabernet franc grapes are more delicate; icewine based on these varieties are regarded as the most premium offerings for icewine. In terms of differentiation between brands, however, even the price bands encountered in the market within each variety were narrow. The represented wineries largely resisted attempts to broaden the customer base down-market, except for the fact that a significant portion of the product was offered in 200 ml bottles that resulted in a lower purchase price per bottle compared to the traditional standard of a 375 ml 'half bottle' of wine. The only outlier on the price spectrum seemed to be Inniskillin, which viewed their brand recognition as a sufficient differentiator to position their product at a significant premium of up to 20% to the competition. Only Peller Estates undertook a meaningful endeavour to introduce a super-premium icewine with their 'Brix 50' product, which retailed at \$450, a multiple of the more regular offering. Emphasis on 'giftable' packaging was universal, as all producers realized its importance in light of the large part of product purchases that was seen as being intended for gifting. The packaging solutions that the different producers chose varied, ranging from label graphics intended to invoke a luxury impression to cardboard or wooden gift boxes.

The substance of the marketing measures described in our interviews reinforced the impression that the wineries targeted predominantly carousers in their offering. It appeared that any efforts to expand icewine's appeal to a larger target market that would include consumers from the other quadrants of the modified AO typology were limited.

Conclusion and contributions to knowledge and practice

Using semi-structured interviews as a data set, this paper investigated the brand positioning strategies of Canadian icewine manufacturers. Drawing specifically on Berthon et al.'s (2009) AO framework of luxury brands, and J. Paschen et al.'s (2016) adaptation of the AO

framework for the wine industry, the authors find that Canadian icewine manufacturers follow a similar formula when marketing their goods.

Both from a contextual and characteristic perspective, Canadian icewine manufacturers tend to rely on a specific set of attributes when developing marketing strategies. For example, all manufacturers rely on the same set of icewines based on vidal, riesling, and cabernet franc grapes. All icewine manufacturers sell their goods in a very similar price range, and all Canadian icewine manufacturers use travel and airport channels as a primary vehicle for product sales. Fundamentally, Canadian icewine manufacturers market their goods as gifts, primarily to the Asian marketplace. In terms of the AO typology, Canadian icewine manufacturers stick to the carousers segment. In short, the authors find that there is a lack of differentiation between Canadian icewine brands.

This paper contributes to practice by outlining conceivable avenues for brand differentiation among Canadian icewine manufacturers. Possible actions here might target the perceived transience of the product and could include measures ranging from bottling icewine under vacuum or using dark bottles to minimize oxidization, to innovations to the traditional cork closure. Efforts to position icewine so that existing experts are addressed, or new ones are created also seem like an under-utilized strategy and could therefore be strengthened. In combination, these measures may aid in positioning icewine in all four quadrants of J. Paschen et al.'s (2016) modified AO typology, thereby broadening its appeal.

This research has also contributed to knowledge by operationalizing both Berthon et al.'s (2009) original, and J. Paschen et al.'s (2016) modified AO typology. The findings show that the typologies can provide useful guidance in contributing to practice as well as to the academic literature.

Limitations and suggestions for future research

Notwithstanding the contributions demonstrated above, the current research brings with it some limitations that should be considered in its applications, or that can serve as an inspiration to continue the research. Inherent in the qualitative research methodology used here are limitations to the generalizability of the findings. Since no statistical generalizability can be achieved in a quantitative sense, the sample based on theoretical considerations attains more prominence. Further research with a different subset of industry players may serve to evaluate if the current research has explanatory value for the experiences of other individuals in a comparable situation.

In addition to these limitations, a substantial body of literature on wine marketing exists that examines influences on brand positioning like consumer's perceived and objective product knowledge (e.g. Robertson et al., 2018; Robson et al., 2014), or the use of specific extrinsic product attributes employed by consumers to help evaluate a brand's position (Robertson et al., 2018). A broader, consumer-oriented study could aim to both validate the producer-centric view taken in this research and evaluate if the classification in the AO typology does indeed yield actionable results.

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No potential conflict of interest was reported by the author(s).

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