

# Wine Marketing Checkup



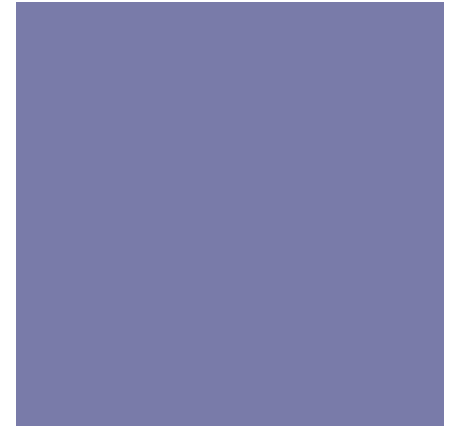
**Capiche Wine Marketing & PR**


Chris Cook



## Today's Workshop

- What role does marketing plan in a winery?
- Creating a marketing plan
- Implementing the plan
- Checklist of marketing strategy elements
- Branding
- Sales
- Q&A





These three come  
together to create  
+ awareness of and demand  
for your wines

1. branding
2. marketing
3. sales

# + The 5 P's of Marketing

Product: What you sell

Placement: Where you sell it

Price: What you sell it for

Promotion: How you alert consumers about your product

Position: The place your product holds in the marketplace



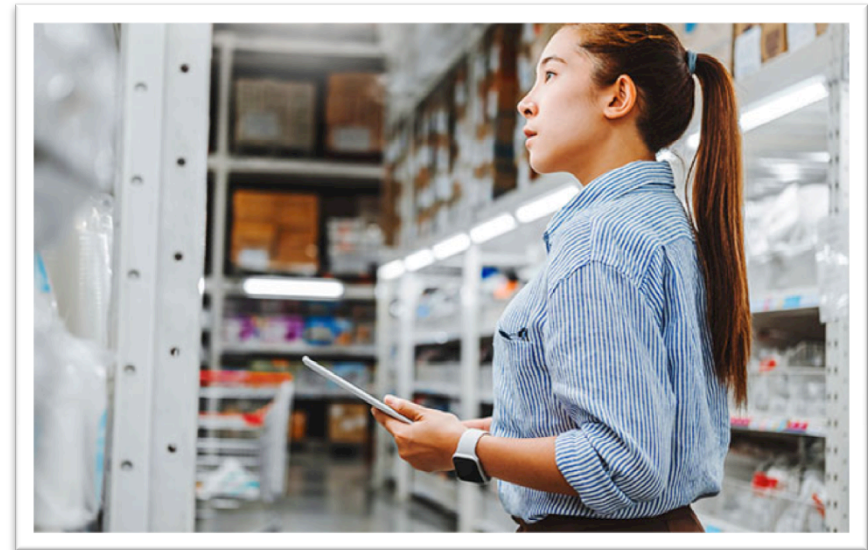
# Overall Process

Effective marketing  
begins with branding and  
leads to sales

- Branding
  - Vision, Values and Purpose
  - Unique selling position
  - Messaging
  - Visual identity
  - Marketing toolbox
  
- Marketing
  - Identify clear goals and objectives
  - SWOT
  - Create “lasagna strategy”
  - Adhere to brand tenets – the “ingredients”
  
- Sales
  - Winery to distributor
  - Distributor to retail store, restaurant or bar licensee
  - DTC

# + Marketing Roles & Responsibilities

- Brand management (product design, packaging)
- Develop and implement promotional tactics
  - Advertising
  - PR
  - Social media
  - Events
  - Special pricing and discounts
- Forecast product volume for sales
- Supply chain participation
  - Grape tonnage requirements
  - Wine volumes
  - Packaging
  - Production schedules
  - Distribution logistics





# Elements of the Marketing Strategy



1. Goals and Objectives

2. Market Research

3. Target Market(s)

4. Competitive Landscape & SWOT

5. Product

6. Market Positioning

7. Place

8. Price

9. Promotion

10. Budget

11. Measurement

# + 1. Goals and Objectives

- Goal = Something you are trying to achieve
  - Launch 2<sup>nd</sup> label for younger consumers
- Objective = Specific result you wish to achieve within a timeframe
  - Conduct market opportunity research in 2022
  - Create prototype products in Q1 2023
  - Market test prototypes in Q2 2023
  - Etc.



## S.M.A.R.T. Goals

- Specific
- Measurable
- Attainable
- Realistic
- Time Bound





## 2. Market Research

- Industry analysis for economic, social, political and market factors
- Suppliers and buyers
- Competitors and new market entrants



**WINE BUSINESS MONTHLY** February 2022

REVIEW OF THE INDUSTRY

**50 WBM**  
Largest Wineries  
Outlook & Trends | Distribution | Wineries

**Winemaking:** Review of the Industry: Outlook and Trends • Review of the Industry: WBM 50 Largest Wineries • Review of the Industry: WBM 50 Winery Profiles • Review of the Industry: State of Distribution • Review of the Industry: 11,300 Wineries • Winemaker Trial: Saccharomyces Versus Non-Saccharomyces Inoculations in Red Wine Fermentation • Analytical Services for the Grape and Wine Industry

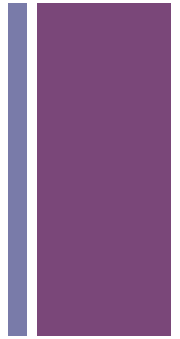
**Grape Growing:** Tillage is Dirty: Modern Vineyard Floor Management • The Best Vineyard Strategies to Implement After a Freeze • Leaf Nutrient Analysis

**Sales & Marketing:** PACK Design Showcase: Imprint of History and Design • Retail Sales Analysis: Retail Wine Sales Down 5 Percent in November

**Business & Technology:** Winery Pop-Ups in Restaurants, Traveling Vans Help Build Brand Awareness

**Departments:** February Month in Review • News • Forever Changes • Winemaker of the Month: Brad Ford

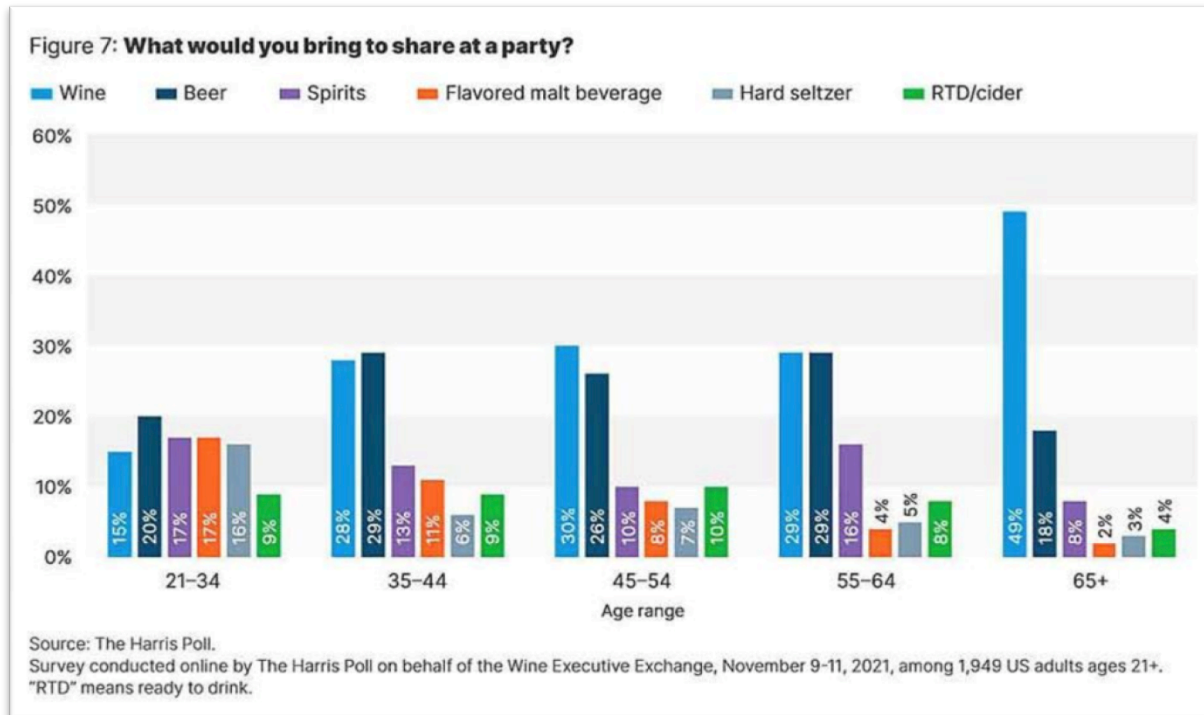
# + Market Research con't.



**Forbes**

Jan 28, 2022, 01:26pm EST | 3,879 views

## '2021 Was A Good Year For The U.S. Wine Industry,' Says Silicon Valley Bank, But Big Challenges Loom Ahead



## + 3. Target Market(s) — People

- Who is your target audience?
- Develop individual personas
  - Gender, Age, Race
  - Religion
  - Occupation/income/education
  - Interests—hobbies/recreation
  - Location
  - Media consumption
  - Relationship with wine
  - Other



# + 4. Competitive Landscape

- SWOT – internal and external analysis
- Competitors can be more than other wineries – seltzers, activities, trends
- Market share
- USP



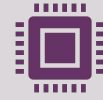
The image shows a SWOT analysis for San Antonio Brewery. The title is 'SAN ANTONIO BREWERY SWOT ANALYSIS'. The analysis is presented in a table with four columns: STRENGTHS, WEAKNESSES, OPPORTUNITIES, and THREATS. Each column contains a list of bullet points.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Years of experience in brewing</li><li>• Established brand</li><li>• Products and packaging</li><li>• Stable financial performance</li></ul>	<ul style="list-style-type: none"><li>• Appeal to other demographics</li><li>• Dependence on past practices</li><li>• Stagnant numbers</li><li>• Weak social media presence</li></ul>	<ul style="list-style-type: none"><li>• Brand redesign can lead to consumer growth</li><li>• Learn more about craft beer and competitors</li><li>• Maintain quality of products but expand collection</li><li>• Look into a partnership with startup brands</li></ul>	<ul style="list-style-type: none"><li>• Small businesses with craft beers</li><li>• Changing consumer preferences</li></ul>



## 5. Product

It's more than wine—it's also the wine club, tasting room, events . . .



Features (packaging, source AVA, availability)



Benefits (prestige, belonging . . .)



What's unique (USP)



Additional support (money back, educational)



Spin-offs (wine clubs, apparel, travel, gifts . . .)

# + 6. Market Positioning

## **YOUR UNIQUE BRAND**

- Rooted in the truth of the organization
- Able to meaningfully distinguish the organization from its peers
- Single-minded but inclusive
- Reflective of reality and aspiration
- Timeless and memorable

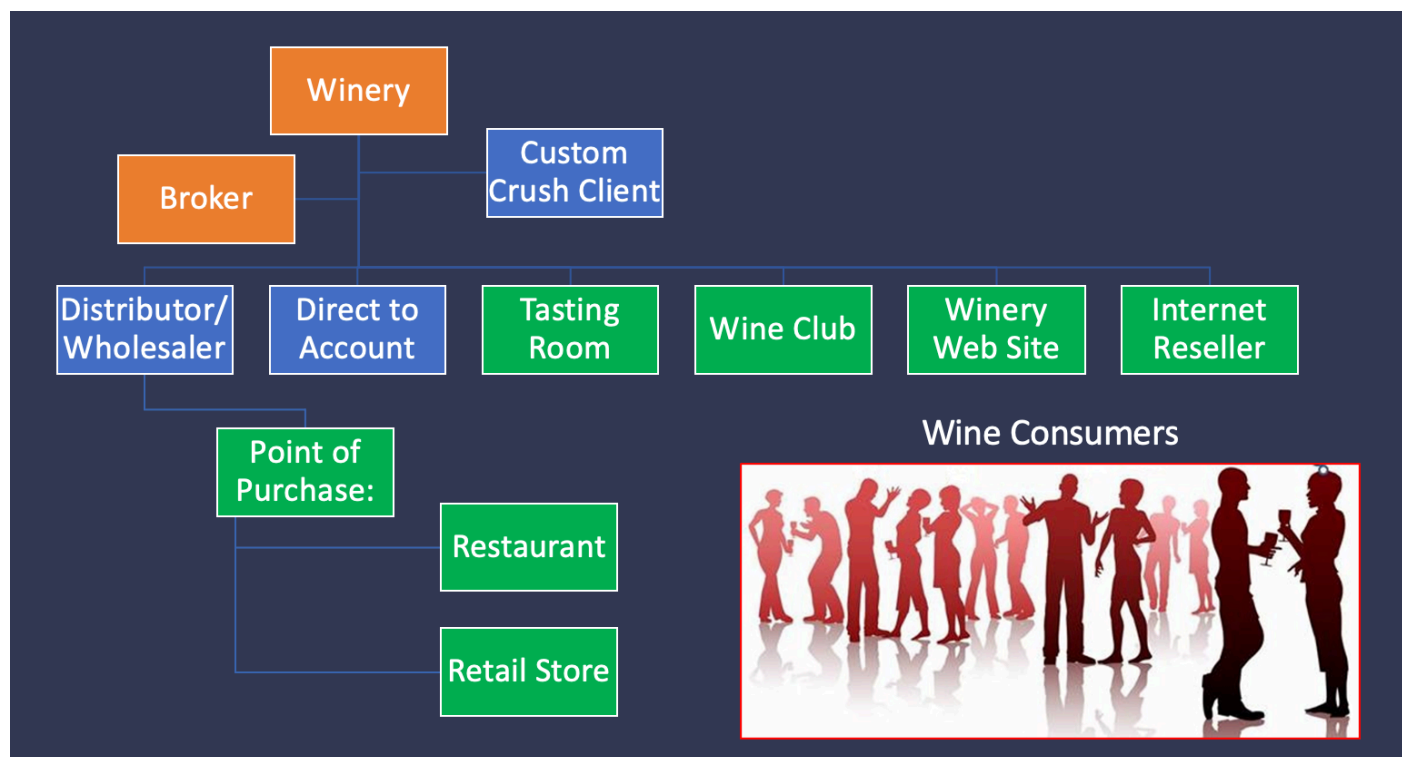
## **YOUR UNIQUE SELLING PROPOSITION**

- What makes your product different from and better than the competition



# + 7. Place

- Sales channels (internet, storefront/tasting room, wholesale, export, direct mail . . . )
  - Which products sold here
  - Percentage allocated
  - Sales strategies





## 8. Pricing Strategy Methods

The most complicated of all wine  
marketing issues

Production-cost pricing

Wine expert pricing

Strategy and consumer-  
driven pricing

Supply and demand

Combination of methods



# + 9. Promotion

Internally – to staff

Sales presentations – to distributors, retail, restaurants

- Trade materials (shelf talkers, tasting notes)

Online

- Website
- Social media
- Travel and review sites (Yelp, Trip Advisor, etc.)

Print materials (brochures, wine club, advertising)

PR activities (print and electronic outlets, events, awards)



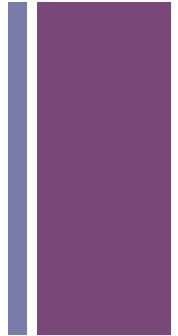
# The Value Proposition

Customize for each sales channel—ultimately for the consumer

- Brokers
- Custom Crush Clients
- Wine Club Members
- Tasting Room
- Winery Website
- Internet Reseller
- Distributor/Wholesaler
  - Point of Purchase
  - Restaurant
  - Retail Store

## + 10. Marketing Budget

- Budget as a percentage of revenue
- Budget as a percentage of profit
- Budget as a dollars per case ratio
- Budget based on marketing program goals





# 11. Measurement – Which Metrics?

Each DTC channel: tasting room, virtual experiences, wine club, phone sales, events, e-commerce

- Net Sales and Total Gross Sales
- Average Order Value (AOV)
- Bottles Per Order



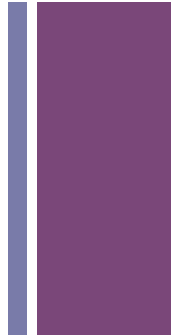


# The Role of Branding

Your bridge between marketing and sales

# + Brand Story Development

- Does it reflect your organizations vision, values and mission?
- Can you tell your brand story in two sentences?
- Do those two sentences resonate with your consumers and trade, or just you?
- Does your story sound like everybody else's?



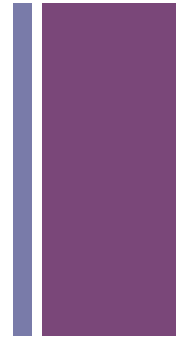


## What Options + Do I Have?

- People/History?
- Place?
- Soil?
- Point of View?
- Personality?

# + A Great Brand Is:

- Rooted in the truth of the organization
- Able to meaningfully distinguish the organization from its peers
- Single-minded but inclusive
- Reflective of reality and aspiration
- Timeless and memorable



**Walmart**  
Save money. Live better.

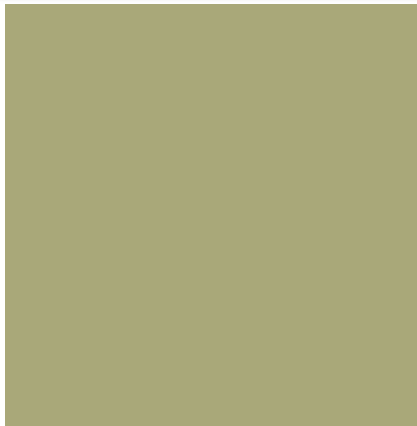
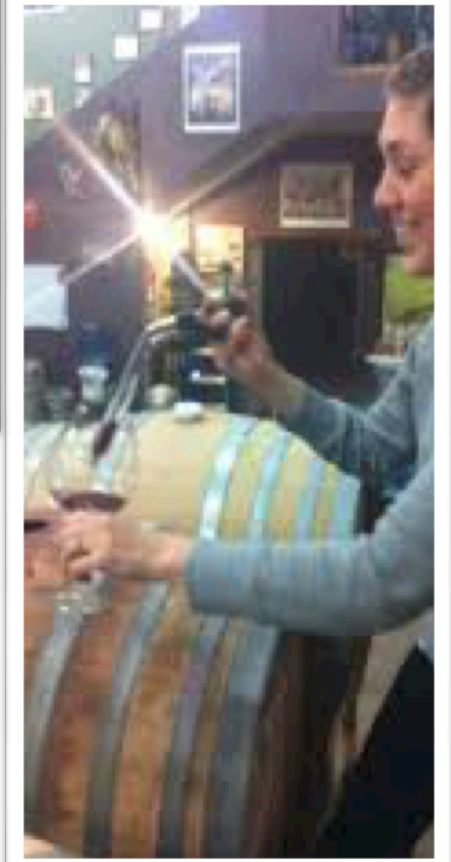
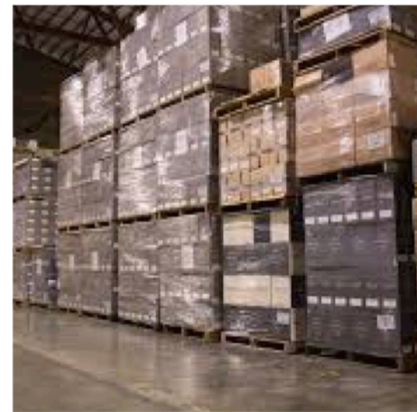






# Sales

- Distribution
- Retail
- Restaurant
- DTC



# + Marketing. When? How?

## Entrepreneurial

### In House

- Bookkeeper
- Sales management
- Winemaking may or may not be outsourced

### Outsourced

- Marketing
- Social media/PR

## Expansion

### In House

- Accounting manager
- Sales director: DTC and FOB
- Winemaking may or may not be outsourced

### Outsourced

- Marketing
- Social media/PR
- CFO

## Maturity

### In House

- Accounting manager
- Marketing team
- Sales team: DTC and FOB
- HR director
- CFO and controller
- Winemaker
- Vineyard director
- Advisory board

Thank You



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