Using family heritage to market wines: A case study of three ‘New World’ wineries in Victoria, Australia.

Introduction
Wineries around the globe are competing for sales of their products (Wright, 2005). To help achieve this goal, some wineries are using a variety of marketing techniques to establish family heritage in many of their marketing campaigns especially via websites and print media. Establishing family heritage is not a new phenomenon for Old World wineries (Cambourne, Hall, Johnson, Macionis, Mitchell and Sharpkes, 2000; Vaudour, 2002; Charters and Pettigrew, 2006) however this marketing technique is being incorporated into New World winery’s marketing campaigns, even though the people operating the vineyard may be comparatively new to the wine industry. Urde, Greyser and Balmer (2007) make the distinction between heritage and history suggesting family heritage can be separated and re-attached whereas history is continuous which is important in the context of this study.

This paper investigates the creation of family heritage of New World vineyards analysing three family wineries from North East Victoria and comparing their perceptions with their customers’ perceptions. These wineries’ include two well established brands of Brown Brothers and Campbells and a relatively new vineyard named Scion. These wineries were chosen for their location, length of trading and/or ownership and marketing campaigns linking their family history with the wine industry. All three have a cellar door for wine tasting allowing direct access to their customers each considered an emic business however consumer responses seem to highlight three main etic characteristics based on family association (Thompson, Locander & Pollio, 1989; Karasawa, 2002).

This type of promotion creates a strong image of tradition associated with wine making even though many generations of family members were not wine makers. Marketing in this way creates an image that establishes creditability through authenticity, longevity and family heritage which fall within the strategic marketing
constructs of family provenance (Urde, 1994; Beverland, 2005; Famularo, Bruwer and Li, 2010; López-Gusman, Rodriguez-Garcia, Sánchez-Cañizares, & Lujián-Garcia, 2011). It has been suggested that promotion in this way could be viewed as misleading (Durant, 2008) by artificially creating family heritage simply by establishing a family connection to wine making as far back as possible. There may be a family history in wine making but does not necessarily translate to establishing creditability to market wineries for New World vineyards. In certain cases there are many generations that are not wine makers but some New World vineyards are actively promoting family heritage links for greater brand awareness. For example, Sorrenberg winery “has a tradition of winemaking that goes back over 500 years to the Mosel River in Germany” however the current winery in Beechworth was only established in 1985 (Sorrenberg, Our Vineyard, 2012, para.1). Merchant and Rose (2012, p.6) suggest that “ad-evoked vicarious nostalgia involves fantasies about past eras and emotions, which impact brand heritage and enhance brand attachment” with vicarious nostalgia being a period that the individual did not live through (Stern, 1992). Vicarious nostalgia may well be prevalent in New World wineries for establishing brand heritage and also the consumers’ attachment to the vineyard and consequently their choice of wine. It is a definite technique that can establish brand heritage.

Previous research regarding wine heritage has focused on branding strategies of Old World vineyards (Beverland, 2005; Peterson, 2005) however this paper is focusing on a gap in the research by investigating the purpose of family heritage to promote New World wineries. Three main questions raised to help bridge the gap include; why use family heritage as a marketing strategy in New World Wineries? What is the heritage halo transfer onto my family? and is using heritage lineage a legitimate form of wine marketing when there is a break in the family history of winemaking from the consumer’s point of view? An examination into three vineyards in regional Victoria in the North East (considered a New World region) (Frochot, 2000) and their customers will investigate if establishing family heritage is ‘good practice’ in marketing New World wineries and a useful and legitimate marketing technique to increase overall wine sales.

Old World vineyards versus New World vineyards
As this is an exploration into New World vineyards, the distinction between Old World and New World wine regions needs to be clearly defined. Old World vineyards and regions are usually referring to mainly European countries that have a long established wine producing history (Cambourne, et al., 2000; Magistris, Groot, Gracia and Albisu; 2011). New World vineyards are attributed to countries that have established vineyards more recently such as Australia, Canada, America, New Zealand and South Africa (Geographical, 1994; Hall and Page; 1999; Frochot, 2000). Although some of these countries have had vineyards established for more than 200 years (Strickland, 2009), these countries and regions are still considered New World. Therefore reviewing case studies from regional Victoria definitely qualifies them as New World vineyards as Australia, as a whole, is considered a New World country.

**Family Heritage**

Many wine marketing campaigns try and establish links with the past to highlight longevity and family heritage of their brand (Peterson, 2005). This is because wine sales can actually increase by showcasing heritage links and enrich peoples’ lives through a greater enjoyment of the wine through association. However, there is no set definition of heritage regarding wine (Aplin, 2002). It is therefore is up to the consumers’ interpretation of the overall product (Stuart, 2012). Howard (2003), Gibson (2009) and Avery (2009) and Urde et al. (2007) point out that heritage can be an identity and does not necessarily have to be a tangible object such as a building but can be an association with a legacy such as a family name. It is therefore reasonable that the consumer can be influenced by family association with the product. This has been successfully done for centuries in Old World wine regions (Alpin, 2002).

Coccosis and Nijkamp (1995) suggest that family heritage linkage should not be limited to European countries but also the rest of the world including New World countries. New World wine countries may not have been established for as long as their European and Middle Eastern competitors however many New World vineyards have also been in operation for well over one hundred years. Some New World wineries may also reveal a long association with the wine industry dating back to Old World countries which also increases heritage linkage through association with wine. Howard (2003, p.6) suggests that heritage has a clear relationship with inheritance which means ‘legacy’. It could be argued by simply being a relative or ancestor may
be enough of an association to create family heritage links with the wine industry. This idea suggests that although the vineyard may be relatively new, having a long family association with wine establishes family heritage.

Direct wine sales can be attributed to the customer associating themselves to the vineyard, the wine product, the experience or the connection with the family. Howard (2003) also suggests that it is that association of a place or product that is important for future sales. Hall and McCarthur (1996, p.74) state that “marketing is a critical element in the management of heritage” and making a legitimate connection with the customer. This is because “the idea of sense of place is closely related to identity” (Hall and McCarthur, 1996, p.180).

Another reason for suggesting that family heritage is important for marketing wineries is it can be associated with quality and targeted to niche markets (Misiura, 2006). For example, Scotch Whiskey is a unique heritage product (Aplin, 2002; Misiura, 2006). Customers associate this product with longevity, traditions, heritage and unequalled quality. This has created a niche market focusing on customers that are willing to spend money consuming a product that has a long history of cultural provenance. Family heritage status may also be showcased in this way as these suggested elements are all present; quality, tradition, prestige and targeted niche market. This could be extended to New World wine regions. Getz, Carlsen and Morrison (2004) use Pelham Family Estate Winery in Ontorio, Canada as an example of establishing family heritage by highlighting the long family history associated with ownership of the land that the vineyard is now situated on (dating back to 1794), even though grape vines were not established until 1988. Misiura (2006) demonstrates similar examples with South African vineyards. These examples indicate that if family links can be established and promoted, it may assist with the future sales of wines therefore it is a marketing technique worth pursuing.

**Marketing techniques**

The most evidenced examples of establishing family heritage can be seen in print media and the internet. This may be due to potential customers’ ability to read and digest information themselves. The internet is a medium for information collaboration and dissemination without regard for geographical location (Anheier,
2008). Although the internet is highly utilised as a research tool, it may also give misinformation (Freidman, 2006) therefore vineyards should only publish correct information and not be misleading. Verbal communication is also apparent in the wine industry but it is mostly used at the winery when the customers are already present (Houghton, 2001).

Methodology
Minichiello, Aroni, Timewell and Alexander (1995) identify that semi-structured interviews begin with broad interview questions but rely substantially on the interaction of the interviewee and the participant to gain information. A mixture of open and closed questions was used to direct the conversation toward the topic at hand without compromising the participants’ sense of independence. The approach therefore taken was to examine three wineries as case studies in the North-East region of Victoria, Australia using this method. The selected wineries were chosen as a means of identifying both similar and contrasting patterns. This exploratory study had to include wineries that were not only family owned and operated but actively promote and market their winery as having a strong family heritage through print and online media. The three wineries were:

1. Brown Brothers Winery, King Valley
2. Campbells Winery, Rutherglen
3. Scion Winery, Rutherglen

Campbells was established in 1870 and Brown Brothers in 1885. Both are still family-owned and are foundation members of the marketing group First Families of Australian Wine. They are amongst the biggest operators for the region and for family-owned Australian winemakers. For Campbells, production is mainly in the Rutherglen area. Brown Brothers has vineyards in a wide range of regions, though its only cellar-door is at the original vineyard at Milawa. In contrast, Scion was only established in 2002 and is a small operation.

Each winery was asked to provide a family member or winery representative to be interviewed at their cellar door. The interviews were semi-structured and this methodology was chosen as a way of gaining rich and complex data on their opinions
and perspectives as winery employees. The respondents were told that we wanted their views about how family influenced their operations and marketing. They were all very forthcoming and the interviewers only had to provide occasional prompts. In two instances, respondents asked that certain information remain confidential and these sections have not been used in this article.

The three wineries also consented to allowing their customers’ to participate if they chose. Customers were selected by entering and sampling wines at the cellar door then volunteering to participate. This is an appropriate means of data collection as the customers have been exposed to the brand through tastings and verbal interaction. In addition, we have utilised other published material, including websites, winery and regional histories, wine guides, advertisements and brochures and magazine articles. We also engaged in participant observation, with all wineries having been visited at least twice. The information was transcribed and coded into Nvivo which is a software program that supports qualitative research including interviews and presents the data, in this case, into themes based on similar words or sentences (Nvivo website, 2012, para.1). Nvivo may alert the researcher to trends that have been overlooked and allows for the preservation of integrity of the participants responses (Smyth, Maxwell & Laird, 2000). The reliability estimates of case study research can be determined by the reality of similar situations and its ability to be replicated and interpreted which is deemed an acceptable method for qualitative research (Morgans, 2004).

**Regional Context**

North-Eastern Victoria is a well established small region, 250-300 kilometres north-east of Melbourne. It is divided into five sub-regions: Rutherglen, Beechworth, Alpine Valleys, King Valley and Glenrowan. Wine making started in the 1860’s and has continued to grow. In 2008, Tourism Victoria listed the region as having 33 wineries with cellar-doors open to the public, of which 14 were in Rutherglen (Tourism Victoria, 2008). Nearly all of these are small to medium family-owned enterprises. The region is relatively well-watered and fertile. Rutherglen, on the plains of the Murray River, has a hot climate and is renowned for its red wines, particularly Shiraz and Durif. The King Valley is cooler and in recent years has diversified into a wide range of new Mediterranean varieties, such as Sangiovese, Gamay and Marsanne (Rutherglen, 2011, para. 3). Today, the North-Eastern region only accounts for 5% of
the state's cellar doors (Tourism Victoria, 2008) however it is still an important and well-known wine region.

The research is exploratory and not concerned with making generalisations about all wineries’ in the region. The theoretical perspective would suggest that ‘family heritage’ is emic regarding individual business promotions however more etic in family connection from the consumers’ point of view (Karawasa, 2002). These suggestions may also apply to other wineries.

**Findings and discussion**

Each of the three case studies was examined individually with the combined results given at the end. This allows for each vineyard to be interpreted individually and then collectively. At each winery, all customers from 10:00am-5:00pm were approached for participation over a weekend period of two days in Winter. The overall response rate was 78% (82 participants out of a possible 105) with just over half being female. The mean age was 45 years and approximately the same number of participants for each winery.

Brown Brothers is one of Victoria’s oldest and well known wineries in Australia. Dating back to the first plantings in 1885, the family having no previous experience in wine making, quickly became one of the largest and leading vineyards in North-East Victoria. The Brown Brothers website is a vital marketing tool to communicate the long history of Brown Brothers and clearly highlights the geniality of the vineyard. “Steeped in tradition and inspired by innovation, every bottle comes from our family to yours” is a theme carried throughout their marketing campaigns (Brown Brothers, 2012, para. 1). Other examples such as “Victorian family owned winery”, describing a family member as “the matriarch of wine” (The Daily Post., 28th Sep. 2010, p.11) and always promoting family history.

In an interview with an employee representing Brown Brothers says it is all “about representing the family”. Acknowledging that he is a “pseudo-family member” as he is not family related, he has been working for the company for more than twenty years. He also went on to state that “one of the things stressed at the last meeting was the power of the brand of the family”. Having a “family owned company and have the
heritage behind us...gives us an edge”. “On the third generation now...we’ve got to get the story out there that it is a family owned company”. Throughout the rest of the interview, repeated words were often used to describe the business including “history”, “family”, “heritage”, “generations”, “brothers”, “children”, “brand”, “tradition”, “authentic” and “innovation” that all collectively add to creating family heritage. Story telling about their history and the family is an important part of the Brown Brothers marketing strategy. Still trading after one hundred years with a Brown’s family member always involved reinforces family association.

He went on to highlight that longevity is key to their success at Brown Brothers. “You’ve got to be around for one hundred years to know how to operate a winery...it’s about being there for the long haul”. He also suggests that family operated wineries have a “passion for wine” and back these sentiments up with a discussion of the family lineage from 1889, through the 30’s 50’s to the present day stressing that “there has never been a break, it’s been continuous” [in family wine making lineage].

Other comments echoed the number of family members that actively work for the Brown Brothers brand reinforcing the heritage ties. “[Family member 1] sits on the board, [2] is PR Manager, [3&4] operate All Saints, [5] was in human resources, [6] was an engineer...they all came back to the company”.

Customers of Brown Brothers stated that “The family heritage is on the board over there”, “I love that I can relate to the family” and “I never had thought about it [family heritage] but I guess it does influence my purchase...I like that I tell the story when drinking the wine”. Other customers mentioned “the family knows what they are doing”, “the wine is consistently good” and “wine making is in their blood”.

Comparing the responses from Brown Brothers and their customers it becomes apparent that family heritage and lineage is essential to the marketing campaigns and management of this winery. Brown Brothers actively promotes family heritage in all marketing campaigns and has the family lineage displayed on their walls at cellar door. The sales team also use language that highlights the business is a family
operated winery for at least three generations and it is something that their customers can and do relate to that transfers to wine sales.

**Campbells Winery**

The oldest of the wineries used in this paper, Campbells winery has just celebrated more than 140 years of wine making. Located in Rutherglen, traditionally a gold mining town, Campbells winery is one of the original vineyards still trading. As their website suggests “John Campbell, a Scottish immigrant heeded the words of Rutherglen’s first winegrower who said dig gentleman, dig, but not deeper than six inches for there is more gold in the first six inches than there is lower down” (Campbells, 2012, para.1). Campbells is another larger company that strongly emphasis family heritage in their marketing campaigns.

The Campbell’s employee highlights the company’s marketing angle of family heritage. “Family permeates everything you do” which is “multi-generational” as it “gives a competitive advantage”. He also proudly explains as there has been “continuous wine-making since 1870 and that is a key thing for us” [our successes]. Rutherglen is all about “the history, the heritage elements and of course, family” to make a point of differentiation. “Here at Campbells, I would suggest we are probably the most prominent in the region in pushing the family aspect of the business…it’s a card we play with all our sales and marketing activities. We talk about being a fifth generation family wine-making concern we use to differentiate ourselves from the majority of the 2900 other wineries in the country”.

Using the family angle is strongly evidenced by Campbells joining the **First Families of Australian Wine** marketing campaign. Not only is this campaign proactively challenging Old World wineries showcasing Australia’s long history of family wine it is also “a way for New World wineries to compete with Old World Wineries”. These marketing campaigns assist in establishing creditability and a story behind the wine which is essential for future sales as “people can relate to the family and buy the wine”. They do this mainly through print media and the internet (Australia’s First Families of Wine, 2012).
Campbells customers commented that “Campbells is a great family winery”, “they are the oldest in Victoria so their wine must be good” and “I come back every year”. When asked What do they know about Campbells family heritage? Three customers replied “I’ve met three of the Campbell’s family members”, “I know it goes back a long way” and “they just told me over the counter” [at Campbells cellar door]. Does it affect your purchasing decisions was also asked triggering these responses; “I love the family aspect so I am happy to purchase”, “having the family wine maker serve us was excellent….we bought a box [12 bottles] rather than just one” and “I think it is important to connect and family and history can always do that”.

Campbells is another example of winery actively promoting family heritage as their main marketing angle. As the oldest trading winery in the region, the family owned winery is well placed to use this to their advantage. The customers also can link family and winery longevity as key factors in purchasing wine and adding to the success of the business.

Scion Vineyard
Scion Vineyard was established in 2002 and is the newest winery to the Rutherglen region open to the public. Although in its infancy, credibility and family heritage is being promoted. The owner of the winery states on their website “I am a descendant of the Morris family of Rutherglen, and we think we might have wine in the blood – we not only enjoy consuming it but our forefathers were one of Rutherglen’s earliest wine families” (Scion Vineyard, 2006, para. 2).

The website continues highlighting “our heritage lies in G.F. Morris, of Fairfield Vineyard, one of the founders of Rutherglen’s wine industry, and successful exhibitor and exporter of wines in the late 1800’s. Great great granddaughter, Janice Milhinch, and great great great grandsons Rowland and Lachlan have replanted one of Rutherglen’s century-old vineyards and built a small new winery with cellar door on an old winery site, just 2 km from the Rutherglen township” (Scion Vineyard, Our Story, 2010, para. 3). Family heritage is reinforced with additional comments such as “with great great great grandfather G.F. Morris peering down, a pioneering vigneron and businessman who set up Rutherglen’s Fairfield Vineyard in 1859” (Scion Vineyard, 2006, para. 4).
The website is not the only media to showcase family heritage. Newspapers also report in a similar way. “One of the best newcomers is Scion Vineyard. Jan Milhinch and her son Rowley are descended from G.F. Morris, one of Rutherglen's pioneers, but have only been in the wine game since 2002, when they established a small winery just outside town. Their range of wines is a nice mix of the innovative and the thoroughly traditional” (Allen, 2008, p.41). The wording not only acknowledges the recent establishment of the vineyard, it also promotes family lineage to the wine industry even though their ancestors lived over 150 years ago.

This is a definite attempt to link family heritage to assist in establishing credibility. In an interview with a Scion representative explained that the business is “family run” and has a “connection with the Morris family”. He also highlighted that Melba Morris “is a cousin of my grandma” [another well established vineyard down the road]. Although Scion vineyard has a “certain heritage attraction to it” including “traditional family entities”, he suggested it now has a “progressive and young energy”. “It is important to have generational wine making to establish credibility” but a point of difference is “family tradition against family innovation, which is what we are trying to push” he says. “The Scion name essentially means old and new, you know generation of the noble family, new graft on old root stock”.

Scion’s representative went on to suggest the location of the vineyard was chosen as their family was originally from the Rutherglen area. “We’ve got family history...so we kind of use the old to give us credibility”. He went onto add “that traditional methods have been done here for a long time [which] helps give a point of difference, juxtaposed against family tradition is family innovation, which is what we are trying to push”.

After interviewing Scion’s customers, a discussion regarding family heritage prompted these responses: “I don’t care that they are new...they are from a family of wine makers”, “clearly they are related to wine [industry] so they can promote themselves anyway they want” and “they aren’t lying...they have a history of wine making”. Interestingly, the sample yielded no responses suggesting that their
vineyard is misleading. On the contrary, customers supported their wine family lineage and could associate more to the product knowing the family heritage.

The customers of Scion did not seem to be perturbed regarding the relatively newness of the winery. In fact, making a heritage link through family works in their favour suggesting it is a potentially good way to promote their winery. Scion can also establish family lineage which assists in their overall story and assuimgly wine sales.

**Interpretation of participating consumer responses**

Wine consumers can offer a very important insight into their decision making process by verbalising their thoughts (Houghton, 2003). This is evident by key themes emerging from the wine consumers’ responses:

1. Family is the most important factor in establishing seller-consumer bonds with wine customers;
2. Family status will be accepted by consumers if the business can establish links to wine making;
3. Having a historic, nostalgic story that consumers can identify with is essential for wine sales.

Although each emic business offers different products and services, consumers appear to want similar experiences at each individual winery which indicates more etic characteristics. For example, all respondents indicated that identifying with the family of the vineyard is essential. This is easily achieved by having a family story that indicates the family lineage of wine making therefore allowing consumers to determine family status. It appears that if these three themes can be communicated easily and affectively, customers would more likely make a wine purchase at that particular cellar door. It is interesting to note that no respondents mentioned that the quality or value for money of the wine was important except for a Campbell’s customer who stated that “they are the oldest in Victoria so their wine must be good” and another from Brown Brothers stating the wine is “consistently good”. There is no other evidence regarding the quality of the wine, simply except the length of operation which demonstrates all three themes. Establishing family heritage is only
one marketing technique and is a legitimate and acceptable form for New World wineries as long as family heritage can be established. The challenge for the wineries is to further produce and promote quality products otherwise the established family name and heritage may be undermined.

**Conclusion**

The three participating wineries indicated that establishing family heritage is a key marketing tactic in their overall promotional strategy. Through their two main forms of communication being print media and web sites, strong images and wording highlighting the importance of family heritage. It is believed that this assists the winery in establishing credibility which may aid future wine sales. Family heritage promotion has been very successful in Old World vineyards and seems plausible that it can also be used successfully by some New World vineyards.

If family heritage can be established, it is a legitimate form of marketing practice for New World wineries. This is further evidenced by the marketing booklet titled **First Families of Australian Wines** directly targeting potential consumers in Old World regions as it showcases longevity, traditional and how well-established some wineries in Australia actually are in which Campbells and Brown Brothers are two of the fifteen founding members. Family heritage promotion appears to be exactly the type of information wine consumers demand to enhance their current cellar door experiences but also to associate with the family through vicarious nostalgia of the vineyards history. This can certainly be re-enforced by having family members actively present in cellar door or accessible to potential wine customers increasing the possibility of wine sales through family heritage association.

The participants indicated a strong propensity to capitalise on family heritage by highlighting it in all their main marketing campaigns. They believe it establishes creditability, longevity of the vineyard, creates relatable stories and linked to quality which may translate to future wine sales through wine heritage halo transfer meaning the benefits are passed on from generation to generation. This is definitely tried and proven in Old World wine regions and these three case studies also indicate the benefits of this form of marketing. This is recommended for new wineries to the
industry as it is a proven marketing technique for both Old and New World wine regions and assists in customers associating with the brand.

Being a small exploratory study, future research should increase the number of case studies and therefore customer access and focus on how successful these campaigns are in other the New World winery regions in Australia and around the globe. If an increasing number of New World wineries are able to market themselves through family heritage, this may be a good way to compete directly with Old World wineries and dilute their previous dominating marketing advantage.

**Implications**

It appears that establishing family heritage is an important branding and marketing technique that has been successfully used in the past in Old World wineries. This paper suggests that is can be and has been incorporated into New World wineries marketing campaigns with success. The implications for all New World wineries is that it is a legitimate form of marketing that can assist with wine sales generation if the winery can establish a link to the wine industry of the past. The most common linkages are winery ownership or wine making therefore giving a heritage halo transfer suggesting wine is and has always been part of their family heritage even if significant breaks in the wine industry have occurred. Wineries may also link back to the Old World bridging the gap between the longevity of wine production in both worlds. It is strongly suggested that future wineries also try to link to the wine industry through family heritage where-ever possible. This ultimately may impact the way some New World wineries market themselves.

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References


