The effect of concentration of retail power on the specialist knowledge of retail staff in the food and beverage sector: A case study of wine retail

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3.1 Introduction

Prior to World War II, the grocery market in Western countries consisted of small independent grocery stores, which were owned and run by local families. These families made an effort to get to know their customers and to maintain a personal connection with them. They "knew where their customers lived, how many children they had, even how they liked their meat cut" (Koch, 2013, p. 6). The customer would ask at the counter for the food items, and grocery shopping had a large focus on customer service. Customers would regularly visit the same store to purchase their products because they were able to obtain store credits. In 1916, Piggly Wiggly, an American supermarket chain, introduced the self-service grocery store where customers were able to walk through the store and select their own products (Koch, 2013).

In contemporary society, most individuals purchase their groceries from convenience stores, supermarkets or hypermarkets, and increasingly online. Convenience stores are usually small (average selling area of 2,800 square feet), closer to consumers, and charge higher prices than supermarkets (Hovhannisyan & Bozic, 2016). These stores are often run by small independent retailers and consumers use them to do their top-up shopping. In contrast, supermarkets are relatively large (average selling area of 4,000–27,000 square feet), on city outskirts, and offer more convenient shopping hours. Here, consumers are able to buy food and household products at more affordable prices. Recently, the market has been dominated by a limited number of large-format, multiple-store retailers where consumers do their bulk shopping (Dobson, Waterson, & Davies, 2003). The food superstore or hypermarket/supercenter has become the dominant retail format in developed and developing countries (Gustafsson, Jönson, Smith, & Sparks, 2006). Here the traditional supermarket has been complemented by warehouse stores, supercenters, and combination stores (Binkley & Connor, 1998). These changes have led to the decline of

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independent smaller stores (Hawkes, 2008) and to growing consolidation and concentration amongst retailers.

Recently, governments and organizations have become concerned about the concentration of retail power in a small number of businesses in the food sector (OECD, 2013). Concerns have been expressed in North America and European countries (Dobson et al., 2003; Ivey, 2004), the Asia-Pacific region (Dixon, Hattersley, & Isaacs, 2014), and South America (Hawkes, 2008). Some governments are placing restrictions on the development of large supermarkets to protect small stores (Hawkes, 2008). Although the main concern about this concentration of power has been its effects on prices for consumers and farmers, the concentration of retail power might also have other effects. For example, it may lead to a loss of expertise amongst retail staff with respect to the food products they are selling, particularly where large supermarket chains out-compete specialty retailers with specialist knowledge. This reduction in knowledge may affect the stores' inventory, as retailers with expert knowledge can use this to purchase high-quality and specialty food products. The reduction in knowledge may also affect the ability of staff to communicate with consumers about food products.

3.2 Wine retailers as a case study

For some product categories, expert advice is more important than for others. Aqueveque (2006) argues that expert opinion is particularly important for "experience goods" (products whose quality is difficult to judge in advance), such as wine, because it reflects a measure of objective quality and reduces the consumer's perceived risk associated with purchase decisions. When purchasing "experience goods," less knowledgeable consumers might desire guidance from an expert. In such cases, consumers might consider wine retail managers, either in a supermarket or in a wine specialty store, as experts and seek their advice.

This chapter will investigate the effect of current retail trends on staff expertise using a case study of supermarkets and wine retailers in New Zealand. Knowledge of wines amongst staff in different retailers will be explored, using wine competition results as a proxy. The chapter will investigate their relationships and communication of their expertise with customers. The chapter will also consider the experience of New Zealand consumers when shopping for wine, in particular regarding their interactions with retail staff at different retailers. This study has possible implications for the theoretical framework of service-centered marketing logic (Vargo & Lusch, 2004).

3.3 The concentration of food retail power in New Zealand

Grocery shopping in New Zealand has followed worldwide trends. The concentration of retail power has developed more recently than in, for example, the USA, but is now arguably more extensive. Today, in New Zealand, most grocery retailing is concentrated into two large companies: Foodstuffs and Progressive Enterprises. These companies own all the major supermarkets in the country. Foodstuffs are New Zealand's biggest grocery distributor. Foodstuffs North Island Ltd. owns the supermarkets: New World, Pak'n Save, Four Square, Shoprite and Write Price, as well as the off-license liquor chain Liquorland, and two wholesalers: Gilmours and Trends Wholesale (Foodstuffs North Island Ltd., 2017). Foodstuffs South Island Ltd. operates the supermarkets: New World, Pak'n Save, Four Square, On the Spot Convenience and Raeward Fresh, the off-license liquor chain Henry's, and the wholesaler Trends Wholesale Ltd. (Foodstuffs New Zealand, 2017). Progressive Enterprises is the second largest grocery company in New Zealand and is part of Woolworths Limited (the Australian parent company). It operates the Countdown supermarkets and is franchisor of the Super Value and Fresh Choice supermarkets (Progressive Enterprises Limited, 2017). These companies operate the majority of New Zealand's grocery retailing. The share of wine sales in New Zealand supermarkets has increased from 30% in the early 2000s to almost 50% in 2016 (ANZ Bank New Zealand Limited, 2016). This rise may be due to the supermarkets' ability to bulk sell alcohol very cheaply, and also to sell wine within one-stop-shopping, allowing them to out-compete standalone wine retailers.

3.4 Method

This chapter uses a case study of supermarkets and wine retailers in Dunedin, New Zealand. As the study was exploratory, two qualitative research techniques—focus groups and in-depth interviews—were chosen for their ability to capture rich perspectives; advantages that might be less easily achieved with quantitative methods, such as surveys. The two techniques allowed for a deeper exploration of participants' words and emotions (Neuninger, 2017) regarding the topic of investigation (Krueger & Casey, 2015). Focus groups have the unique property of allowing unrestricted interaction amongst participants, who are able to express their ideas spontaneously and to share their thoughts and feelings. One-on-one interviews, on the other hand, are useful when investigating topics that are too complex for focus groups, and that require a deep understanding of the experiences of different individuals and the meanings they make of those experiences (Neuninger, 2017).

3.4.1 Data collection and analysis

Following the method of Krueger and Casey (2015), four focus groups were conducted. A total of 44 wine drinkers, 22 females and 22 males, participated. Participants were allocated to a focus group according to their level of involvement with wine (Neuninger, Mather, & Duncan, 2017). The discussions explored their attitudes toward different wine retailers, and details of their wine purchase decision-making. Then, seven in-depth interviews were conducted (Gubrium, Holstein, Marvasti, & Mckinney, 2012) with three wine specialist store managers, two managers of general off-license chains, and two department managers of grocery retailers (one from Foodstuffs and the other one from Progressive Enterprises). A set of standardized questions was prepared and the interviews were semi-structured in style. The participants were interviewed to explore their perceptions and opinions on their own levels of expertise in the wine retail environment and to understand the types of questions that consumers ask them. Each session lasted from 30 minutes to over an hour. All focus groups and in-depth interviews were audiorecorded and transcribed verbatim (Johnson & Rowlands, 2012), and thematic analysis was used (Braun & Clarke, 2006; Neuninger et al., 2017). The transcripts were analyzed for emerging themes concerning: (1) the retail environment where consumers purchase wine and the reasons for selecting that environment; (2) consumers' perceptions of retail managers' expertise in the different types of retail environment; (3) retail managers' perceptions about their own level of expertise in the different types of retail environment; and (4) the evidence of the managers' expertise. The participants' knowledge and perceptions of wine competitions were used as a proxy for specialist wine knowledge.

3.5 Findings and discussion

3.5.1 Findings from the focus groups with wine consumers

3.5.1.1 The supermarket

This study determined the retail environment where consumers purchase wine and the reasons for selecting that particular environment. Participants across all focus groups purchased their wine in both the supermarket and wine specialty stores. However, participants predominantly purchased wine at the supermarket. The majority of participants indicated they preferred the convenience of being able to buy wine when doing their other grocery shopping. This is consistent with the finding of Hawkes (2008) that consumers liked the convenience of purchasing all groceries at one place. This was described as being "easy" (FG4). Many of the participants also mentioned that their preference toward wine shopping at the supermarket was due to the low prices and frequent sales available:

> *At the supermarket if the wine has come down on price I will certainly buy it ... (FG1).*

> *It's not super specialist and there might be a lower price range (FG4).*

Participants also discussed the promotional activities used by supermarkets to encourage purchase behavior (Ritchie, Elliott, & Flynn, 2010). Such activities include cheap deals on international and national top wine brands for which the supermarkets intend to build and maintain customer loyalty. These sales were noticed by consumers when passing the wine aisle and encouraged purchase behavior. Participants responded to wine branding in conjunction with sales:

> *Sometimes when I'm walking through the supermarket and see one that I know that it is a quite good brand is on special, I would grab it (FG1).*

The majority of the participants noted that supermarkets were also smart in their promotional strategies (Bäckström & Johansson, 2006). In agreement with Ritchie et al. (2010), in-store tastings in the supermarket were often appreciated by consumers:

> *Supermarkets sometimes have someone with the tiny little plastic cups and you can taste it (FG2).*

> *. . .and quite often they will make tastings there as well, so people can always go and try it before you buy it, which is nice (FG4).*

> *If you are in the supermarket where there isn't somebody to recommend, they have the shelf talkers and various things (FG3).*

In addition, it appeared that the selection of national and international wine at the supermarket has now expanded to rival that of specialty wine stores, providing further incentives for respondents. For example, one of the participants said that she was buying wine at "[supermarket name] because of the broad selection" (FG4).

3.5.1.2 The wine specialty store

While wine was predominantly purchased in the supermarket, many respondents also talked about the reasons for occasionally going to a wine specialty store. Those who enjoyed drinking wine and who wanted to "buy a more expensive bottle" or "a new case [of wine]" (FG1) would go to a wine specialty store. Participants thought that the wine specialty store was the right place to get additional information about wine, particularly when considering purchasing quality or expensive wine, or a larger quantity of wine. The supermarket was not the right place to make bigger purchases as explained by one of the participants:

> *If I wanted to buy a new case [of wine] I would go and see a specialist, I wouldn't buy a good wine at the supermarket . . . I am not going to go to the supermarket to stock up (FG1).*

Other participants emphasized how they felt that in the wine specialty store they could talk to a knowledgeable salesperson. This interaction was particularly important when participants felt they needed answers to wine-related questions regarding production, vintage, flavor, and pairing. Those who worked in the wine specialty store and who had many years of work experience were perceived as being more knowledgeable than those in the supermarket:

> *I quite enjoy wine so I generally go to a specialist shop because if you want to ask questions, people tend to have more specialist knowledge so they can tell you where the wine comes from, about the different flavors and things like that . . . generally you get a good answer (FG4).*

> *I really enjoy shopping for wine in the wine shops and there is one really good one [in the city]. The staff there [are] really knowledgeable and I think that they have been doing their job for many years . . . If I want to try something new then I would go and talk to [the sales person in the wine specialty store] about what I would want it for and who do I want it for . . . I wouldn't buy an expensive and unknown wine from the supermarket (FG1).*

Other participants emphasized how they would go to a wine specialty store to buy wine for a special occasion (e.g., as a gift). Talking to a salesperson was particularly important when wanting to buy a particular type of wine. Participants also talked about how the salesperson in the wine specialty store was generally able to match the wine according to what they had described to them and how much they would trust them:

> *The two times I had to buy wine for a gift for someone who really liked red wine, I went to [the wine specialty store] and I said, "Listen, this is what I want to spend" . . . and I really trusted them. We all trust the man at [the wine specialty store] (FG2).*

> *I just couldn't believe how well it was how much I wanted . . . I keep going back to get that wine and to try some more (FG1).*

3.5.2 Findings from the in-depth interviews with wine retail managers

The findings of the second part of this study focused on retail managers' expertise in different wine retail environments. It was found that the expertise of wine retail managers in the wine specialty store is greater than that of those who worked at the supermarket or off-license stores. Out of the seven participants (P1−P7), four had more than 20 years of work experience in the wine retail industry (P4−P7). These experienced participants included all those at the specialty wine stores, and one of the managers of a chain off-license. The remaining three participants (from the supermarkets and the other chain off-license manager) had worked much less in the wine retail industry: one had worked for 2.5 years (P1), one for 7 years (P2), and the other one for 10 years (P3, who was the chain off-license manager). At least one of the specialty wine store managers had also undertaken formal wine training. In this section, empirical findings from retail managers' perspectives are presented.

3.5.2.1 Supermarket and chain off-license

Retail managers who worked in the supermarket said that they did not consider themselves to be experts. Nevertheless, one retail manager admitted that although his knowledge about wine was not extensive, he knew enough about "the differences between all the sort of variants of wine and that sort of thing" (P2). Another indicated that despite a lack of in-depth expertise, he was able to "match the consumer with the type of bottle of wine that will suit them" (P1). The other supermarket and off-license retailers matched this level of competence, knowing basic differences between the different wine varietals:

> *I know the difference in variance ... between white and red and Shiraz and Merlot and Merlot Cab ... I definitely wouldn't say I'm an expert. I know ... the procedure and how they're made, obviously with the skins and stuff, but I don't go round... tasting wines and know what's a good wine compared to a bad wine ... Probably just intermediate [knowledge] (P3).*

The level of expertise was reflected in the amount of product used by the retailers. For instance, although working in an off-license retail shop where customers are reliant on retail managers, one respondent admitted he did not have the knowledge to advise on the quality of the wine and drank little:

> *I've probably tasted a few of the wines in the store, but again, I probably wouldn't know what is good compared to another one ... I don't really drink wine that much (P3).*

All the retailers in the supermarket and off-license chain emphasized that it was their basic knowledge (often gained from reading the back of the wine bottles while stacking the shelves) that allow them to provide customers with general and limited advice on the wine characteristics and food pairings:

> *I point them in the right direction and tell them what sells and what is a good wine to go with ... what sort of dish ... a red wine with a beef ... or white wine with chicken... I just ... read the back and ... whatever it says on the bottle, I'll ... memorize through putting it on the shelf a thousand times (P2).*

Our results also suggest that this group of wine retailers thought that they were perceived by their customers as being knowledgeable about wines, despite their actual limited wine knowledge and brief wine retail experience:

> *I think they probably think we're experts. So we don't tell them we're not ... you've got to remember here people just really want bang for their buck ... you still get the people that are looking for really nice wines and things but we don't sell those. We're mainstream. It's 10 percent of our income so it's not something we put a great store on now (P4).*

To assess the retail managers' specialist knowledge, the topic of wine awards was used as a proxy for the participants' wine knowledge. Most supermarket and chain off-license managers displayed a lack of knowledge of wine awards. When asked to talk about their knowledge of wine awards, one of the participants said he didn't "really know a lot about them" (P2). Another said that he didn't have "any experience with them" (P3). In their personal wine consumption, awards played no role in their purchase decisions:

I like to try the wine and make my own decision (P4).

I don't look for awards. I just . . . look for something that I've drunk and I've liked (P3).

Results also suggest that their interest in wine awards largely concerned consumer reaction to stickers:

Well people like bottles of wine with medals on them. The more medals, the more likely they will pick them up by themselves. I have my doubts sometimes on how true they are (P4).

No, don't really notice what awards. I mean you get New Zealand awards and then overseas awards. All the supplier does is really just stick a gold thing on it if they've won it (P3).

Other participants had similar opinions that the stickers were only important as a visual attraction.

I also have an interest in which wines are winning which awards. When a sales rep comes in . . . and if they want to sell me a wine . . . one of the selling points they'll use, "It's been awarded these awards", and one question I'll ask is, "When you deliver these wines, are they going to be stickered?" (P1).

3.5.2.2 Wine specialty store

In contrast to the supermarket and chain off-license managers, the wine specialty store managers regarded themselves as wine experts. One participant said:

I would think I'd be pretty good in that respect I would say . . . We've plenty of experience over the years tasting wines so I don't know whether I'd be up to a top wine judge's level, but certainly I would say I was more than competent in that respect (P5).

The specialist managers thought consumers saw them as either expert or reasonably expert: "I think they would tend to regard what we have to offer and the product knowledge that we have as being at the expert level" (P6). Surprisingly, two out of three specialist managers were slightly modest about their perceived image. For example, one of the managers discussed the perceived ranking by consumers when coming to the wine specialty store by saying, “In this particular forum . . . they need to see it as higher than theirs so . . . 1−9, it would have to be 6 or 7” (P7).

In contrast to the supermarket and chain off-license managers, the wine specialty store managers were knowledgeable about their individual products and had personally tasted most of them.

> *We like to try and have the smaller, more boutique vineyards and . . . we try probably about 80 percent of the wines that we stock before we stock them, and we try because we’ve got to hand sell them, we’ve got to know what the wines are like (P5).*

The consumers shopped at the wine specialty stores for a number of reasons including the perceived expertise of the wine retailer:

> *I’d like to think people come in here because they can get a bit of advice . . . The wine industry . . . we’re awash with wine from, not just . . . here but from all over the place, and I think to most people who aren’t that savvy with wine, when they’re confronted with rows and rows of wines and some of them have medals on them, some of them don’t . . . some of them have got rather fancy labels . . . people are a little bit overawed by that and . . . they will come in somewhere like here and say, "Look, I want to spend X amount, what have you got, what could you recommend?" . . . People would come in here specifically . . . to get something that maybe they would be a bit wary about spending NZ$40 in the supermarket and not really knowing what they’re getting (P4).*

In contrast to the other retailers, the specialty store retail managers had knowledge about the wine awards process, and strong opinions on the awards procedures and standards. These opinions were generally strongly critical:

> *I think they’re a complete waste of time. Because again, they’ve divorced themselves from the reality of drinking a wine . . . a person tasting 1,000 wines in a wine tasting has no more ability at tasting the third or fourth label sensibly, simply because as a human being his taste receptors are completely shot after the third glass (P6).*

This detailed knowledge and strong personal convictions were coupled with a concern about the impact and number of awards, based on a strong involvement with the industry:

> *It’s changed over the years. I think if you’d asked me maybe 10 years ago what the impact of wine awards was in this country, I would have said it was quite significant and I would say now it is quite different . . . I’m certainly in the industry and I can’t keep up with it all, so I don’t know how the consumer is supposed to be able to keep with it all (P5).*

The specialist retailers believed that the wine awards were used in supermarkets where the staff had a lack of personal knowledge and expertise, and that their own expertise rendered wine awards redundant in specialty stores:

> *I think they perform a very important message or communication at a particular level of the market. That's a level where . . . a wine stands alone on a shelf without any external advice or communication or recommendation around it (P7).*

> *It's probably more beneficial for a wine to have medals on it in a supermarket setting just because there isn't anybody there generally speaking to advise people (P5).*

The specialty store retailers' opinions that awards were more influential in supermarkets were consistent with the observations of the supermarket and general off-license retail managers that consumers were clearly influenced by awards in their stores. The specialty retailers, however, were influenced by some particular wine awards, which they felt retained credibility:

> *. . . less and less but still they must have some wine awards I still respect because the criteria is still integrity (P7).*

> *If we did have a wine that . . . had a trophy of a big wine award and we thought it was particularly good, I might sort of mention that (P5).*

The wine specialty store managers only took the presence of particular awards as a weak indication to try the wine themselves before buying for stock. They then used their personal taste to corroborate or discard award information:

> *We don't believe the distributors and the winemakers when they tell us that, "This wine is fabulous, it's won gold medals, we should buy this and sell it for that." We have to take the wine, look at it, taste it and decide whether it is in actual fact worth the money that they are actually charging, and if it is not we reject it (P6).*

3.6 Conclusions

The goal of this chapter was to investigate the effect of retail concentration with respect to "experience goods." Based on a case study of supermarkets and wine retailers in New Zealand, this study has demonstrated that there is a lack of expertise in bulk retailers. The majority of the goods are sold in the bulk retailers with a small market for specialist stores with expert retail staff.

Overall, specialist retailers' expert knowledge affects the stores' inventory, as the retailers use their knowledge to purchase high-quality and specialty wine products. This knowledge also affects the ability of staff to communicate with consumers about the wine products, with specialist retailers offering detailed advice reflecting their high involvement with the industry. These retail managers could be classified as “expert-influencers.” The staff of supermarkets and general off-licenses still thought they were perceived as experts, but might more accurately be classified as “pseudo-expert influencers,” offering basic advice gleaned from the labeling on wine products.

Most importantly, results presented in this chapter indicate that the concentration of power may lead to a loss of expertise of retail staff with respect to the products they are selling, as large supermarket chains out-compete those specialty retailers that often hold specialist knowledge. However, although the one-stop-shopping concept is increasingly seen as being convenient, there is still currently enough demand from consumers for expert advice that a small number of specialized retailers still survive.

Although most theoretical attention has been devoted to price and variety as a function of retail power (Inderst & Shaffer, 2007), there has been a recent recognition of the need to include service in the theoretical models (Vargo & Lusch, 2004). Such service includes the on-going relationships between skilled and knowledgeable retail staff and consumers. This study’s findings contribute to the theoretical framework of retail power and “experience goods” by highlighting need to include the role of expert knowledge in marketing and economic models.

In order to improve customer experience and to build long lasting relationships and customer loyalty, it is necessary that “pseudo-expert influencers” become “expert-influencers.” Supermarkets can achieve this by providing product training and tastings on a regular basis that will increase product familiarity and sales. Then consumers will retain the benefit of expert advice despite retail power concentration.

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