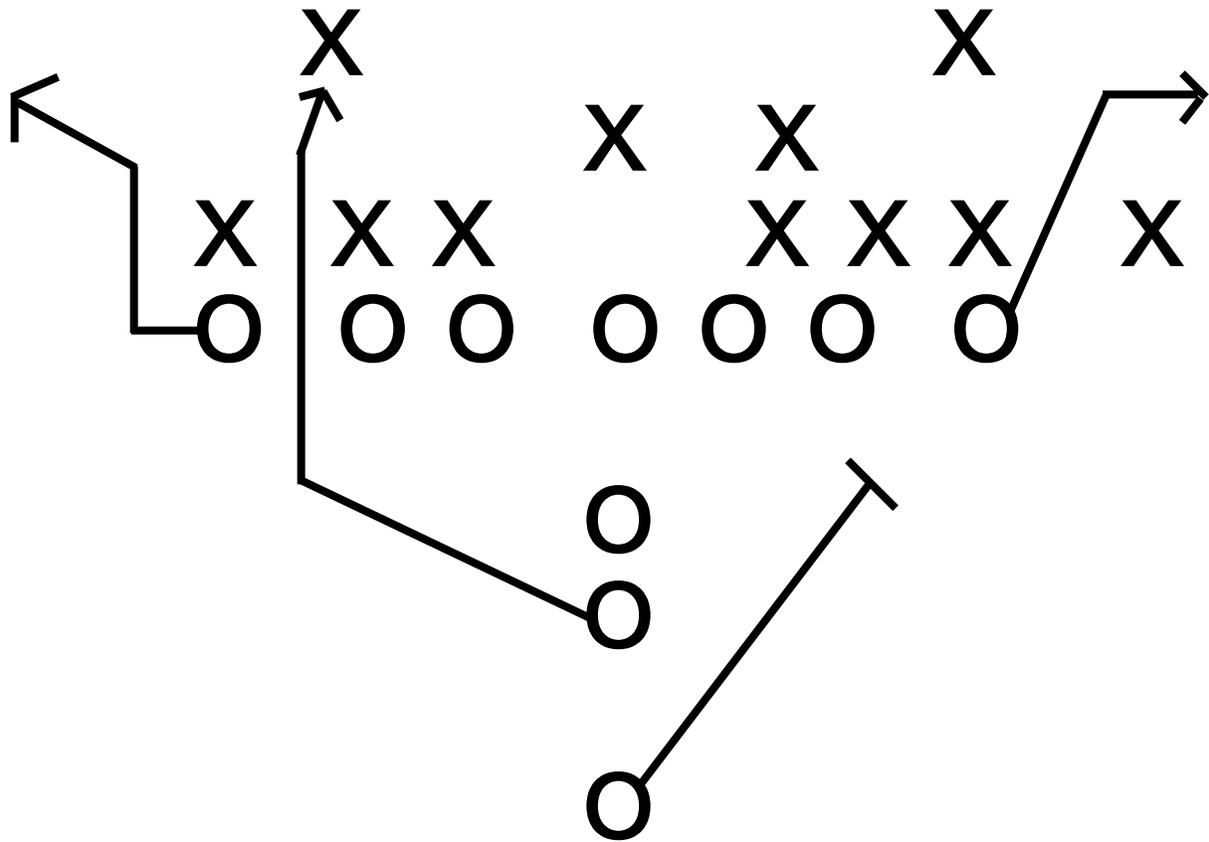


THE MUNICIPAL LIQUOR STORE

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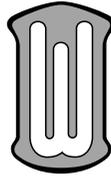


How to Compete Against Total Wine & More (And Why You Should Care)

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ON THE COVER

The retail industry giant Total Wine & More has entered the Minnesota market.

This issue is a playbook of their operating strategy and how to compete with them.

Some smaller facilities and those in Greater Minnesota may be asking why they should care.

In short, while Total is not a direct competitor, it is a good bet they will seek legislative initiatives harmful to all retailers, including Sunday Sales and Warehousing.

In addition, purchasing their proprietary products and offering them at competitive prices, below Total's, not only generates income, it send a competitive message to customers.

What facility doesn't want to say they have product cheaper than the big Metro retailer?

Please contact the MMBA office if you have questions on any aspect of this playbook.

Finally, to the Total Wine & More representatives reading this... Welcome to Minnesota!!

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MMBA President's Message



Brenda Visnovac
President

The machine that is Total Wine has now successfully opened four locations in the metro area, and as much as I **HATE** to admit it, they are brilliant marketers.

Long before Total Wine & More ever applied for their first license in Minnesota, we were made well aware of their marketing schemes by other retailers and distributors from across the nation. The Total Wine business model is to sell nationally known products at or below cost in order to draw the consumer into them.

Once inside, the unknowing customer is enticed by slick sales associates, whose primary goal and purpose is to discourage the consumer away from the national brands, while persuading them to purchase Total's "proprietary" brands, which, in their words, are better quality and a better value. However, these proprietary brands are dramatically overpriced by typical retail liquor standards... and that is how they make their millions of dollars!

How can you fight this?

Price match?? Impossible unless you want to go out of business!

Hone up on your customer service within the store? Well if you aren't doing that daily, you aren't doing your job as a manager!

Make sure your store is neat and clean? Ditto to the above!

There is no magic bullet, or so I've been told. But Lakeville Liquors is adapting to this new market and we

are going to do our best to retain the customers we have, regain others and hopefully even create some new store ambassadors for our operation. We are doing this by educating the consumer.

Thankfully, as municipal liquor store managers we have been doing this for years. Whether you are a small or large operation, we have had to educate our customers on the benefits of municipal liquor operation.

Now we need to educate our consumers as to how the Total Wine system works:

1. First, we all owe Rogers Wine & Spirits Manager, Gary Buysse a big thank you for demanding that our operations have access (as required by state liquor laws) to all proprietary brands Total Wine carries. He obtained a list of 1700 items Total carries with case prices. From this list I created a workbook that contained all of these items reflecting Total's prices listed in their Shoppers Guide to what Lakeville Liquors retail price would be. Total Wines markups of these items are typically on average around 145%, meaning we reflect a huge savings to customers wishing to order from this list. As an example, we had a customer purchase a case from the list and she was astonished at the savings she received. Viola! One person educated of the 55,000 in Lakeville But she has also has become a Lakeville Liquors ambassador educating her friends and others about the savings she received from us.

2. We called Total Wine out in the stores and in social media, buy purchasing Veil Vodka. A product of Total Wines that had been requested most often at the St. Anthony Municipal. Cost is \$13.30 per bottle. With our

typical markup we would make approximately \$4.00 a bottle on it. Total Wine makes nearly \$7.00 on every bottle and a markup of 50%. We used this product as our super special this month, with signage that reflects Total Wines retail price compared to Lakeville Liquors. The consumer is saving \$5.00 per bottle and we still made our full mark as a super special item. Now the question arises, items only have value to the store if they sell. So does this product sell? In three weeks we have sold 389 units, and in essence educated 389 more customers. Now only 54,610 more residents to go!

3. We also brought in 22 other Total items, 17 proprietary wines and 5 spirit brands. We targeted the items from Total they had the highest gross profits on. We then researched the items on line looking up ratings and viewing websites to ensure the packaging was appealing. Once received, we placed these items on the shelf with shelf talkers that reflected Total Wine's price compared to ours. These disparities ranged from a couple dollars and lower priced items, to as much as \$10.00 on others. These items are also selling and again, more ongoing education!!
4. We aren't going to say we haven't adjusted our prices in order to be more competitive, as we have lowered the top twenty brands of wines and some spirits as well. But in lowering retail prices, I want to ensure we are able to offset that loss in other ways by enhancing profitability elsewhere. In order to maintain our gross profit, we are going to start utilizing some of these proprietary brand feature reflecting

(continued on page 16)



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Total Wine & More Fact Sheet

- In Minnesota:
 - Beer is sold in segmented franchised wholesale territories within the state.
 - Wine can be either franchised or not and is distributed in statewide territories.
 - Spirits are distributed in statewide territories and cannot be franchised. However, suppliers have *preferred* wholesalers where the majority of their promotional budgets are spent.
 - Purchasing options / deals must be available to all retailers.
 - A variable volume price offered by a wholesaler to a licensed retailer on sales of distilled spirits or wine may not be for a quantity of more than 25 cases.
 - Retailers may not store excess stocks of intoxicating liquor in places other than the licensed premises without written approval of the commissioner.
- Total Wine's business strategy is to offer national brands at, below or just above cost and excessively mark-up *proprietary* brands.
- Here are some standard Minnesota markups. It is a guideline and can change based on demand, competition etc.
 - 6-pack = 38% - 43%
(27% - 29% GP)
 - 12-pack = 33% - 38%
(24% - 27% GP)
 - 24 -pack = 28% - 33%
(21% - 24% GP)
 - Specialty Beer = 35% - 40%
(26% - 29% GP)
 - Wines = 45% - 50%
(31% - 33% GP)
 - Miscellaneous = 43% - 48%
(30% - 32%)
- Pint and half-pint = 45% -50%
(31% - 33% GP)
- .750 = 35% - 40%
(26% - 29% GP)
- Liter and 1.75 = 33% - 38%
(24% - 27% GP)
- Cordials = 38% - 43%
(27% - 29% GP)

How to Order Total's Proprietary Brands

- A Johnson Brothers pricelist has been created for Total **and available to all retailers by contacting Gary Stokvis at Johnson Brothers or the MMBA Office.** Prices are "Case One" with no quantity discounts.

Some products are also available through other wholesalers. However, Johnson Brothers is the only wholesaler offering these discounted prices.

- **If you want to order any of these items, it is necessary to contact Gary Stokvis at Johnson Brothers directly.**

His email is garystokvis@johnsonbrothers.com or 651-649-5809.

Timeline for delivery is approximately three weeks.

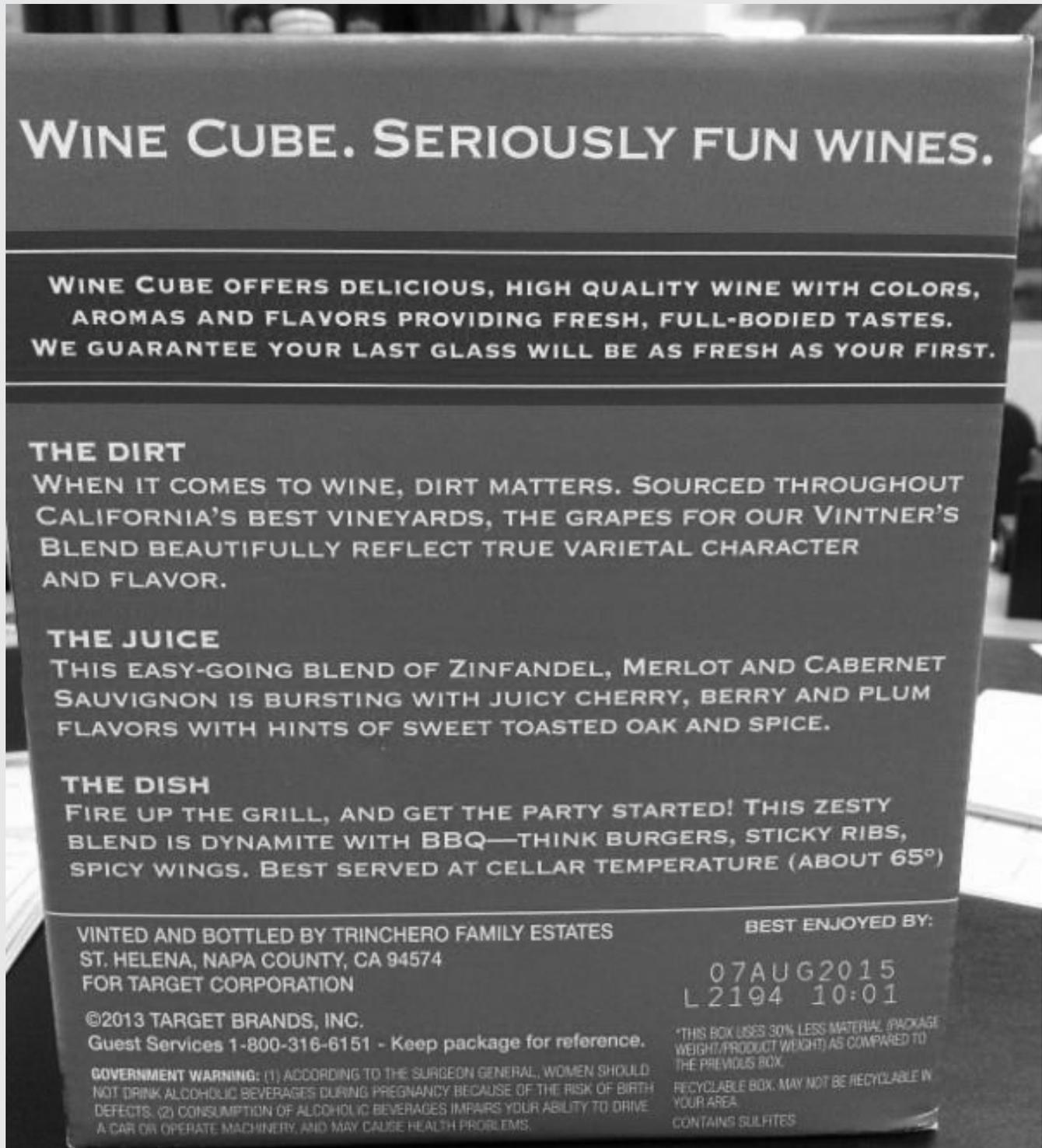
- Here are some actual Total examples (October 2014) and possible price options using the above guideline. (Total prices were found from their in-store customer pricelist and website)

<u>Wines</u>	<u>Size</u>	<u>Case One</u>	<u>Btl Cost</u>	<u>Total Price</u>	<u>Mark Up</u>	<u>MN Markup Price</u>
Carson Ridge Cabernet Paso Creek	750	\$59.76	\$4.98	\$11.99	141%	\$7.99
Bridgman Cabernet	750	\$81.00	\$6.75	\$15.99	137%	\$9.99
Sonoma Loeb Chardonnay Sonoma	750	\$112.32	\$9.36	\$21.99	135%	\$13.99
Grey Rock Sauv Blanc	750	\$82.44	\$6.87	\$17.99	162%	\$9.99
Gnarled Vine Pinot Grigio	750	\$56.76	\$4.73	\$11.99	153%	\$7.99
Paradise Peak Riesling	750	\$58.92	\$4.91	\$9.99	103%	\$7.99
Cloud Break Pinot Noir Reserve SL	750	\$89.28	\$7.44	\$16.99	128%	\$10.99
Sonoma Cuvee Pinot Noir RRV	750	\$116.28	\$9.69	\$22.99	137%	\$14.99
Sobon Zinfandel Cougar Hill	750	\$102.24	\$8.52	\$17.99	111%	\$12.99
Hi Jinx Red Blend Paso Robles	750	\$57.72	\$4.81	\$11.99	149%	\$7.99
Red Theory Red Blend	750	\$65.40	\$5.45	\$12.99	138%	\$7.99
Malbec Tupungato	750	\$107.88	\$8.99	\$17.99	100%	\$13.99
Tyrells Old Winery Semillon	750	\$72.12\$	\$6.01	\$12.99	116%	\$8.99
Shingleback Shiraz McLaren Vale	750	\$130.68	\$10.89	\$21.99	102%	\$16.99
Piazzini Chianti Classico	750	\$88.44	\$7.37	\$16.99	131%	\$10.99
<u>Spirits</u>						
Summun Select Vodka	1.75	\$117.36	\$19.56	\$32.99	69%	\$25.99
Only Gin	750	\$103.32	\$17.22	\$25.99	51%	\$22.99
Cristiani Amaretto	750	\$66.84	\$5.57	\$12.99	133%	\$7.99
Caruva Horchata Cream Liqueur	750	\$95.16	\$7.93	\$14.99	89%	\$11.99
Veil Vodka	1.75	\$80.34	\$13.39	\$19.99	49%	\$17.99

Proprietary Brands

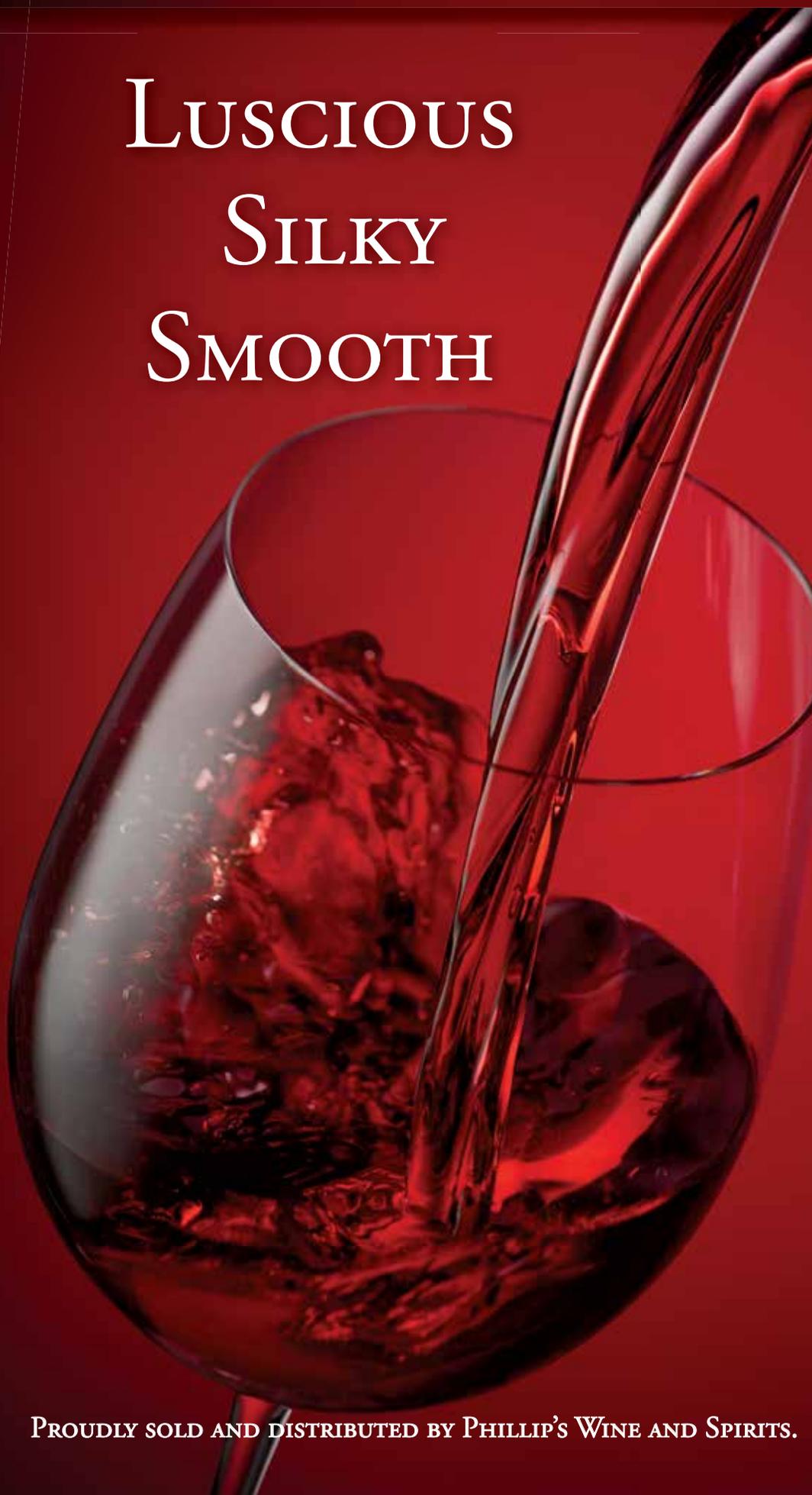
Contrary to popular belief, in Minnesota proprietary brands sold by Total Wine & More and others must be made available to all retailers.

For example, the Target Wine Cube pictured is now being sold at Rogers Wines & Spirits.



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Lakeville Liquor offers customers a variety of Total's Proprietary Brands for immediate purchase using standard Minnesota markups.

In addition, they created a price of all of Total's proprietary products so that if a customer requests an item from them, they can show them what their price would be should they want to order.

Like Total Wine's Prices?

Compare & Save with

Lakeville Liquors!

All wines within this price list are featured in
Total Wine's Low Price Buying Guide.

See inside and be amazed at what you can save at

Lakeville Liquors

If you purchased one of every item in this price list from Lakeville Liquors compared to Total Wine your total savings would be more than \$7,500!

All items within the price list can be ordered by request. Total Wine Prices are from Sept-Oct 2014 Buying Guide.

Lakeville Liquors Club & Case discounts still apply.

While we make every effort to ensure the prices are accurate, they are subject to change without notice.

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After posting the pricelist (example below), Lakeville Liquor received their first case order.

Incredibly, if this individual had purchased this case at Total, their case cost would have been \$179.88.

Because they were in the midst of a Progressive Wine Sale.....the customer paid \$99.99 for the case.

Meaning, they saved a total of \$80.00 on the case and **Lakeville Liquor still made money!!**

Product	Total's Price	Our Price	Product	Total's Price	Our Price
Abbeville Cabernet Reserve Napa	\$15.99	\$11.99	Antica Corte Valpolicella Ripasso	\$19.99	\$12.99
Abbeville Cabernet Sauvignon	\$13.99	\$9.99	Apex Cabernet	\$29.99	\$18.99
Abbeville Chardonnay	\$13.99	\$9.99	Apex Chardonnay	\$19.99	\$13.99
Abbeville Fume Blanc	\$13.99	\$9.99	Apex Merlot	\$28.99	\$18.99
Abbeville Merlot	\$13.99	\$9.99	Arbor Crest Cabernet Five Vyd CV	\$19.99	\$16.99
Aberdeen Angus Cabernet	\$9.99	\$6.99	Arbor Crest Chardonnay Columbia Valley	\$14.99	\$9.99
Aberdeen Angus Centario	\$15.99	\$9.99	Arbor Crest Dionysus Columbia Valley	\$39.99	\$34.99
Accordini Valpolicella Ripassa	\$24.99	\$14.99	Arbor Crest Reisling Dinoyus CV	\$13.99	\$8.99
Albrecht Cremant Brut Reserve	\$19.99	\$15.99	Ares Rioja Crianza	\$14.99	\$9.99
Albrecht Cremant Brut Rose Traditional	\$19.99	\$15.99	Ares Rioja Reserva	\$24.99	\$14.99
Alessandria Barbera D'Alba	\$17.99	\$10.99	Arimanni Pinot Grigio Trentino	\$14.99	\$9.99
Alessandria Barola	\$44.99	\$28.99	Armani Amarone	\$49.99	\$34.99
Alessandria Baroloa San Giovanni	\$54.99	\$41.99	Armani Foja Tonda	\$24.99	\$15.99
Almodi Tempus Terra Alta	\$19.99	\$12.99	Armani Moscato Spumante	\$15.99	\$9.99
Almodi Terra Alta Petite Red	\$11.99	\$6.99	Armani Pinot Grigio Colle Ara	\$19.99	\$12.99
Alterra Cabernet	\$15.99	\$11.99	Armani Pinot Grigio Corvara	\$14.99	\$9.99
Alterra Merlot	\$13.99	\$9.99	Armani Pinot Grigio Friuli	\$11.99	\$8.99
Alterra Pinot Noir	\$17.99	\$11.99	Armani Pinot Grigio Valdagie	\$12.99	\$8.99
Alterra Zinfandel Sonoma	\$14.99	\$9.99	Armani Pinot Grigio Venezia	\$10.99	\$7.99
Amici Cabernet Napa	\$44.99	\$32.99	Armani Prosecco	\$15.99	\$10.99
Amici Pinot Noir	\$34.99	\$23.99	Armani Soave	\$11.99	\$7.99
Amici Sauvignon Blanc Napa	\$23.99	\$16.99	Armani Valpolicella Ripasso	\$19.99	\$11.99
Angeline Cabernet	\$14.99	\$9.99	Arthur Metz Cremant D'Alsace Brut	\$17.99	\$12.99
Anitca Corte Valpolicella Classico	\$13.99	\$9.99	Arthur Metz Cremant D'Alsace Rose	\$17.99	\$12.99
Anne De K Gewurtz Furstentum GC	\$19.99	\$17.99	Arthur Metz Gewurztraminer	\$17.99	\$12.99
Anne De K Gewurtz Vogelgarten VV	\$19.99	\$14.99	Arthur Metz Riesling	\$17.99	\$11.99
Anne De K Gewurtztraminer	\$16.99	\$11.99	Aspaldi Rioja Cosecha	\$9.99	\$5.99
Anne De K Pinopt Gris Schlossberge G	\$24.99	\$17.99	Aspaldi Rioja Crianza	\$12.99	\$8.99
Anne De K Pinot Blanc	\$14.99	\$9.99	Aspaldi Rioja Reserva	\$19.99	\$11.99
Anne De K Pinot Gris	\$16.99	\$11.99	Avenel Cellars Cabernet Napa 1.5 Liters	\$64.99	\$51.99
Anne De K Pinot Gris Altenbourg VV	\$19.99	\$13.99	Avenel Cellars Cabernet Napa 750	\$24.99	\$17.99
Anne De K Riesling	\$14.99	\$9.99	Avenel Cellars Chardonnay RRV	\$16.49	\$14.99
Anne De K Riesling Patergarten VV	\$16.99	\$11.99	Avenel Cellars Napa Red	\$19.99	\$14.99
Anne De K Riesling Schlossberg GC	\$24.99	\$16.99	Avenel Cellars Oakville Cabernet	\$44.99	\$31.99
Antica Corte Amarone Classico	\$39.99	\$31.99	Avenel Cellars Zinfandel Dry Creek	\$15.99	\$11.99
Antica Corte Gargan Pinot Grigio	\$7.99	\$5.99	Ayni Malbec	\$39.99	\$27.99
Antica Corte Pinot Grigio Venezia	\$9.99	\$6.99	B Lovely Gewurztraminer	\$11.99	\$7.99
Antica Corte Valpolicella	\$11.99	\$7.99	B Lovely LH Riesling	\$11.99	\$7.99

Lakeville Liquor Shelf Price Examples

**Shingleback
Shiraz**
Lakeville Liquors

\$13.99

Compare to
Total Wines Price
\$21.99

**Sonoma Cuvee
Pinot Noir**
Lakeville Liquors

\$16.99

Compare to
Total Wines Price
\$22.99

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Lakeville Liquors

\$8.99

Compare to
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Presidents Message

(continued from page 4)

our price, and Total Wines price we are once again educating the consumer while making full markup on a featured product while reflecting a true value to the consumer.

Is this the so called magic bullet? Only time will tell..... but if in a year, we are at or above our sales of this past year, I will consider it a huge success. And maybe, just

maybe, if we educate enough consumers, not only in Lakeville, but throughout the state, we can at least slow down this machine called Total Wine & More from expanding into other regions of the state.

I don't know how each of you will react, but we are "totally" going to keep on educating our customers.

It's our job!

The Best Way to Get Something Done is to Begin



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Web: www.nabca.org

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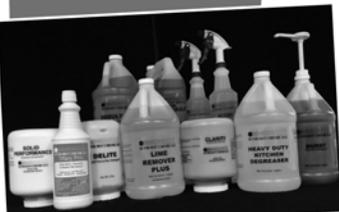
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