

New leverages in customer/place oriented wine branding strategies. The case of wine architecture in experiential approaches to wine marketing

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Abstract

This paper aims at analyzing a recent trend in the wine industry approach to marketing and branding, represented by the use of wine architecture as one of the strategic leverages to provide the customer with a unique wine experience.

Globalization hurries territories and producers to face the new competitive challenge and to catch the new dimension of the demand, which is experience-oriented more than product-oriented. The paper explores the evolution of the wineries' marketing strategies and the leverages they adopt, focusing on the emerging trend of wine experience through wine architecture.

A conceptual model and two case studies are proposed regarding the use of the leverage of winery architecture, together with the wine landscape and the product (the wine) in order to achieve branding distinctiveness and to give the customer (winery visitor) a unique complete experience, made of product tasting, landscape enjoyment and innovative wine architecture appreciation.

This research is based on the conceptualization of strategic marketing trends in the wine industry and on the development of the experiential marketing approach, which appears particularly promising for the wine industry and supports an holistic perspective to the wine experience, based on the elements of the territory, the product and the winery.

Introduction

This paper aims at analyzing a recent trend in the wine industry approach to marketing and branding, represented by the use of winery architecture as one of the strategic leverages for providing the customer with a unique wine experience. Traditionally the wine experience has been confined to consumption/tasting occasions far from the winery (Ho.re.ca. channels, home, more recently wine bars). In some cases the direct contact between customer and winery was limited to the purchase of wine locally, in order to have lower prices, to purchase bulk wine or rare wine otherwise unavailable in common distribution channels. In the last decades this direct contact has been enhanced creating a link between the winery and the customer not only on the basis of the product (the wine, the bottle) but also on the basis of the winery ability to give the customer a complete wine experience creating a new relationship among the winery design and architecture, the landscape, the place and the product.

Globalization hurries territories and producers to face the new competitive challenge and to catch the new dimension of the demand, which is experience-oriented more than product-oriented. The paper explores the evolution of the wineries' marketing strategies and the leverages they adopt, focusing on the emerging trend of wine experience through wine architecture.

A conceptual model and two case studies are proposed regarding the use of the leverage of winery architecture, together with wine landscape and the product (the wine) in order to achieve branding distinctiveness and to provide to the customer (winery visitor) a unique complete experience, made of product tasting, landscape enjoyment and innovative wine architecture appreciation. This research is based on the conceptualization of strategic marketing trends in the wine industry and on the development of the experiential marketing approach, which appears particularly promising for the wine industry and supports an holistic perspective to the wine experience, based on the elements of the territory, the product and the winery. The latter – in its architectural dimension – represents the less explored branding leverage, even though the case study analysis carried out in the final part of the work reveals that it can turn into an effective and powerful factor of attraction of visitors (actual and potential customers) to the winery, especially when used in conjunction with the other leverages.

Literature

New consumer patterns and new leverages in wine branding strategies

The global wine market in the last decade has been going through a deep evolution characterized by many factors such as the globalization process, the technological innovation, the consumer behaviour change and the liberalization of trade. The new global environment has changed the way wines are produced, sold and consumed. Producers sell their wines outside their wine regions and at the same time they face competition from distant producers, trying to meet the consumer desires and expectations. Wine firms and territories need to find new strategies to face the new global competitive challenges and are looking for new strategies with an emphasis on marketing and particularly on branding (Lockshin, 1997; Reid, 2002).

On the demand-side, the globalization has had two opposite effects: on one hand the homogeization of taste as a consequence of the increasing integration of trade, capital, people, information and ideas in one global marketplace, with the creation of a global culture and the risk of losing cultural and environmental differences. On the other hand, we are witnessing a

rediscovery of local identities and a stronger attention to specificity and typicality (Allodi, 2003) where the territory plays an important role.

The consumer behaviour patterns have changed along with lifestyle, food integrity, ethical and ecological sustainability factors, electronic communication. These drivers have led to a demand for quality and customisation. The consumer has become more selective, careful, wise and disloyal to most wine brands. The new consumer language has changed and quality has become a multidimensional concept: in addition to the values referred to the chemical, physical, organoleptic and sensorial features of the product, the symbolic values, together with the psychological and aesthetic attributes, are becoming more and more important. The hedonic attributes contribute to the consumer creation of value and are referred to health, social and environment related dimensions (Mattiacci, Ceccotti, de Martino, 2006). We are moving from the product to the “product system” made of complex and multiple factors, as it happened in a number of markets in the last two decades. The higher value created by the product system can be recognized by the consumer who will be willing to pay a higher price to have it (Fabris, 2003). The product differentiation can be increased working on the quality features that satisfy the tangible and intangible consumer expectations, then communicated to the consumer so that the value differential can be perceived by the consumer, make him willing to pay a premium price (Antonelli, 2004). The marketing literature has traditionally highlighted that the quality of goods can be evaluated on the base of three different dimensions (Nelson, 1970; Nelson, 1974; Darby & Karni, 1973):

1. Search: attributes that can be determined before purchasing a product.
2. Experience: the attributes that can only be evaluated after purchase or during consumption.
3. Credence: represent the attributes that may be impossible to evaluate even after purchase and consumption.

Most of the agro-food products characteristics are of a credence kind. It becomes therefore very important for the consumers to have access to the information about products' composition and processing in order to evaluate their quality (Salaun & Flores, 2001). Wine evaluation depends not only on information on the product and process, but also on how to taste it properly. This is an experiential process which takes knowledge and time to be developed. A third issue for the evaluation of wine depends on the context of the drinking experience. Many authors (Hall, Sharples, Cambourne, Macionis, 2000) claim that the proper evaluation of this kind of products can be enhanced through an experience in the production environment, in order to appreciate the natural (landscape) and cultural (heritage, technology, winery context, etc.) dimensions behind the product. The winescape (Peters, 1997) provides a range of attributes to the wine region making it attractive for the visitor. The relationship between people and the land is a very close one particularly in viticulture, as observed by de Blij (1983): “The cultural landscape of viticulture is embellished by the situation, architectural qualities, layout and general ambience of the towns, villages, chateaux and more modest wineries that are the foci of viniculture and the wine trade” (p. 4-5).

The cultural landscape is characterized by both tangible and intangible elements and it includes both cultural and natural landscape features (Sauer, 1925; Head, 2000). Wine tourism marketing and promotion is often built around cultural landscapes (Leader-Elliott, 2005) whose attributes, together with the distinctive and charming atmosphere, attract visitors not only to taste the wine. Nature, culture, events, wine-tasting become a way for the consumer/visitor to look for experience more than products, for human and cultural relations more than consumption. The consumer starts his visit when he buys a bottle of wine: the label, the bottle shape, the wine colour announce a sensorial experience that will be total

during the wine tasting and will continue when the consumer visits the place where the wine is produced. The bottle of wine therefore becomes a liquid postcard inviting people to visit the wine region and discover all its features and peculiarities that combined together define it as a place and contribute to its attractiveness. According to Bruwer (2003) the appeal of a wine region is based on “difference of place”, which must be recognized and branded. Cook and Crag (1996) identify the role of a place as a source of differentiation: “These geographical knowledges – based in the cultural meanings of places and spaces – are then deployed in order to “re-enchant” (food) commodities and to differentiate them from the devalued functionality and homogeneity of standardized products and places” (p.132).

Terroir, territory, landscape

How can the territory/wine region contribute to the firm market strategy based on **differentiation** (Porter, 1978)? The differentiated product is characterized by its uniqueness and specificity often identified with a brand . In the wine sector the differentiation factor can be based on quality (terroir) and typicality (territory). A form of differentiation relates to the concept of terroir. The concept of terroir refers to an ecosystem in which the vine interacts with environmental factors and human factors (Fregoni, Schuster, Paoletti, 2003). The wines from a specific terroir are unique, incapable of being reproduced outside that area. The components of terroir are important to the wine quality and typicality and may include: mesoclimate, soil, geology, aspect, altitude, vineyard, vinification, human factor.

Wilson (1998) describes the concept of terroir as referred to both physical elements of the vineyard habitat – vine, subsoil, siting, drainage, and microclimate – and an additional dimension represented by the spiritual aspect that recognizes the joys, the heartbreaks, the pride, the sweat, and the frustrations of its history.

Hall & Mitchell (2002) introduce the concept of *touristic terroir* describing it as the environmental, physical and cultural combination that gives every wine region a distinctive touristic appeal. The touristic terroir characterizes the wine and food tourism experience and its quality is determined by the contribution of the entrepreneur, the wine producer, the restaurateur, the hotel owner and the event organizer (Hall, Sharples, Cambourne, Mitchell, Macionis, 2003).

The concept of territory is much wider than that of terroir as it also includes:

- Geographical and anthropic factors: a territory may include more than one terroir;
- Social networks: network of relationships among the actors;
- Economic factors: income, employment, activities and services related to wine;
- Cultural aspects: history, tradition, art, architecture, music.

The landscape is that portion of the territory represented by natural and anthropic factors and by their interrelation. The landscape is not only formed by natural and environmental elements, but also by cultural, historical and artistic factors of the local traditions. The viticulture and cultural landscape contribute to the territorial identity of a wine. The development of an integrated offer that include all these territorial and product elements and that is built on the creation of a proper network among the actors can outline new local development paths for a wine region.

Wine landscape

In our work we will emphasize the key aspect represented by the “wine landscape” referred to the anthropic dimension connecting the viticulture landscape to the winery in order to analyze

how the winery has gone from being traditionally a place of production to becoming a strategic marketing leverage for a sustainable and long term relationship with the customer.

The wine landscape (or winescape as we name it) is a constructed environment, where the role of people and their wineries has designed the natural environment through the use of land for cultivating grapes, with a differentiated “design” in different regions and it has also designed the buildings and production/storage places through the development of a local wine architecture. This constructed environment is in our opinion one of the key elements of the territorial branding strategies coupled with the winery branding strategy.

Leveraging on the winescape as a variable of the customer oriented winery strategy permits to manage the winery not only as a production place but also as a tourism place, introducing new sources of income for the hosting firms, which are related to the hospitality and also to the sale of other local products and services. Moreover, the winescape leverage can be a powerful instrument for building brand awareness and differentiation. Finally, the winescape leverage permits to build a unique blend of winery brand and territorial brand, which addresses the above mentioned need of conceiving the product as a system of attributes, where the role of place branding and of its winescape originates innovative ways of approaching the wine consumer.

The attracting factor of the wine architecture can give uniqueness to the blend of:

- territory (landscape design, winescape);
- product (wine design, which consists of quality and organoleptic attributes, bottle and label design and wine naming);
- and winery (wine architecture, which consists of production/storage buildings and spaces).

The three issues together are a basis for effective and highly distinctive branding policies of wineries.

Wine architecture

The phenomenon of wine architecture dates back to the XIII century with the French Chateaux, when the wineries were still considered a mere place of production, physically separated from the “market”, i.e. the customer. It is only in the 80s that in the United States, in particular in the Napa Valley, started this new way of interpreting the winery as a place where the visitor could be introduced to the world of wine and famous contemporary architects could engage in winery design, in order to make the wineries more attractive and unique for customers and to enhance the wine experience through the leverage of wine architecture. This trend has been developing in Europe since mid 90s (Casamonti and Pavan, 2004) and is now booming in countries like Italy, Spain, but also in the New World countries like Chile, New Zealand and South Africa.

These new wineries combine tradition and technology and the synergy between centuries-old wine tradition and contemporary architecture and design makes them archi-culture works, places where history is consolidated through contemporaneity. They become “talking” structures capable of communicating not only the distinctive product features, but most of all the intangibles aspects of wine, the story of winemaking generations, a company philosophy. In this way wine architecture becomes one of the cornerstones of innovative branding policies, aimed at reaching high distinctiveness through experiential marketing approaches where wine tasting, landscape (winescape) enjoyment and winery architecture appreciation all contribute to build a unique customer experience. The winery is built following the experiential, symbolic, social and emotional values concerning the product and the place. The visitors participate to the winery activity witnessing the production process, watching the landscape from privileged points of observation appropriately created and being able to

benefit from the hotel, spa, restaurant and specialized wine & food or landscape bookshop and follow guided winetasting. Consumers are attracted directly to the winery, allowing the producer to build direct and long term customer relationships, which allow to reduce the power of distribution channels and build both territorial and firm brand awareness, where emotional experience values play an important role. From a “hidden” and almost inhospitable place of production, the winery becomes “transparent” connecting the production, ageing and stocking areas with the external landscape. It is a new relationship among landscape, winery and consumer, and the territory is the element of connection. Winery and landscape become a territorial con-text being the internal part of a well determined portion of territory (geographically, economically and socially). This is why these wineries can be considered cultural markers.

The synergy between design and wine has gone along the last decades through different stages:

- wine design (designing the product in terms of taste and properties). The attention to quality and to an harmonic meeting between customer evolving tastes and wine heritage has characterized the evolution from the production, to the product and then to the market orientation of the wine industry;
- bottle and label design, including wine naming. Sometimes a wine naming may even shadow the firm brand or enhance awareness about it. The label is a key information and emotion provider connecting directly winery and customer and capable of telling a story about the wine and its cultural heritage;
- winery design and architecture, viticulture landscape design. These elements characterize the new approaches to experiential marketing in the wine industry and represent the most recent stage in customer orientation (Ferraresi & Schmitt, 2006). The idea is to establish a direct link between winery and customer not only on the basis of the product (the wine, the bottle) but also on the basis of the attraction of people directly to the winery, and making the winery the place of a complete wine experience.

The wine architecture design does not follow a specific winery design model: every winery looks to be singular in its own way. Some works are spectacular (Frank Gehry for Marquès de Riscal, Spain), some other follow a camouflage approach (Marco Casamonti for Cantina Antinori, Italy) or invent a new philosophy, a new name for the winery (Norman Foster for Portia, Spain). The effort of each winery in being different and unique shows the importance of the relationship with the territory where the winery is located, of the local materials used, of the landscape where the work of architecture need to fit in, of the attention to the functional and aesthetic features.

The winery is not only capable of introducing the consumer/visitor to the world of wine building a real “city of wine”, but also need to integrate with the local offer of the wine system it belongs to. The concept of integrated offer is formed by various elements (Tempesta, Fiorilo, Begalli, Boselli, 2007):

- The product-system in its material and immaterial dimensions;
- The territory in its physical, anthropic and cultural dimensions;
- The ecosystem in terms of quality of the viticulture landscape and terroir.

Branding approach

The global wine market deep evolution that has been occurring in the last 10-15 years, both at the supply and the demand-side, has brought many changes at either the global business environment level or at the single firm/wine region level. Wine firms and regions find

themselves in a more competitive environment and are looking for new strategies with an emphasis on marketing and particularly on branding (Lockshin, 1997; Reid, 2002).

There are diverse approaches to branding definition. de Chernatony & Dall'Olmo Riley (1998) suggest a definition of brand as a complex multidimensional construct whereby managers augment products or services with values and this facilitates the process by which consumers confidently recognize and appreciate these values. The brand becomes the interface between the firm activities and the consumers' perceptions (Kavaratzis and Ashworth, 2005).

de Chernatony (2001) defines a successful brand as "an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant, unique, sustainable added values which match their needs most closely" (p. 9) stressing the added value perceived by the consumer and imbued in the brand. The value of the brand can be associated with functional and symbolic value. While functional values relate to the tangible product features satisfying customers' practical needs, symbolic values refer to the intangible values satisfying customers' self-expression needs. (Bhat and Reddy, 1998; de Chernatony, Harris, Dall'Olmo Riley, 2000). Functional and symbolic benefits can be both included in the brand and marketers may choose to stress them according to how they want the brand to be perceived, creating the brand identity. The process of brand positioning consists in the relationship to competing products within a defined competitive arena. Central to the concept of the brand is the brand image, which incorporates perceptions of quality and values as well as brand associations and feelings (Kavaratzis and Ashworth, 2005).

Conceptual framework

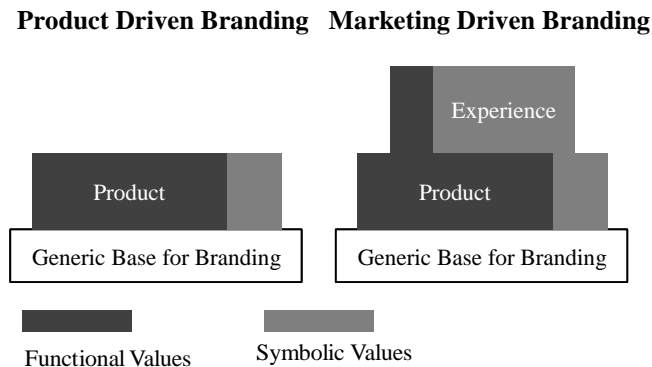
According to Noble, Sinha and Kumar (2002), strategic orientations are the elements of the organization's culture that guide interactions with the marketplace (customers and competitors). Firms can follow alternative strategic orientations: market, production or selling orientation. Research in marketing has put an emphasis on maintaining a market orientation, based on the marketing concept, the philosophical foundation of a market orientation (Kohli & Jaworski, 1993).

Market orientation has received a great deal of attention from marketing research (e.g., Day & Wensley, 1988; Deshpandé & Webster, 1989; Kohli & Jaworski, 1990; Narver & Slater, 1990; Ruekert, 1992; Slater and Narver, 1994). In particular, Kohli and Jaworski (1990) consider the essence of market orientation as composed of three sets of activities: generation, dissemination and responsiveness to market intelligence. According to Narver and Slater (1990) market orientation consists of three different behavioral components: customer orientation, competitor orientation and interfunctional coordination and two decision criteria – long term and profitability. There are many concepts that result from both the above frameworks, such as the customer understanding and the importance of a prompt reaction to market opportunities. Furthermore, Noble, Sinha and Kumar (2002) consider the brand focus as an additional dimension to Narver and Slater framework of market orientation: "brand focus ... reflects the firm's emphasis on the development, acquisition and leveraging of branded products and services in the pursuit of competitive advantage" (p. 28).

Our conceptual framework is based on the distinction between two types of wineries: product-driven and market-driven (Shelton, 2001), considering that some wineries are focused on production while others have a marketing strategy, in addition to the production focus (Getz, 2000). We elaborated the emergent approach to branding by Mowle and Merrilees (2005) based on branding sophistication. In their model, they consider two branding approaches with a different level of branding sophistication. The first approach is characterised by a dominant focus on production and a relatively limited approach to

marketing and promotion. The second approach describes wineries with both a focus on production and a dedicated marketing strategy with a higher level of branding sophistication. Their findings resulted in the emergence of a model of SME winery branding with two approaches, product-driven and marketing-driven branding.

Figure 1 Mowle and Merrilees emergent approaches to branding



Source: Mowle and Merrilees, 2005

The generic base for branding considers the factors that are common to both approaches, such as the premium product, the image of quality wines, the use of a name and symbol to represent the winery, the participation to regional events, etc.

In the product driven approach mainly functional values are associated with the brand, such as quality, taste, variety and value for money. The symbolic values also refer to the product component (i.e. the characteristics of a wine resulting in an image of exclusivity).

The marketing driven branding has a more holistic approach that includes not only the product, but also the experience at the winery. The experiential, symbolic, social and emotional values are here added to the product component. The focus is not only on wine, but also on the total wine experience created at the winery, with a much greater emphasis on marketing, promotion and merchandising. The symbolic values are not tied to the product component in this approach but refer to the experiential values in the brand (enjoyment, good time). de Chernatony *et al.* (2000) note that, although functional values are important in the brand construction, the symbolic values are a more sustainable form of differentiation than functional values.

Starting from the distinction in wineries orientations given in the previous description of the literature and considering the results from our wine market observation, analysis of wine business cases in different Italian wine regions (Franciacorta, Oltrepò Pavese, Colli Piacentini) together with interviews with the wine producers and the wine organisations, a new model emerges with two more approaches to branding in addition to the ones indicated by the Mowle and Merrilees, as shown in Figure 2:

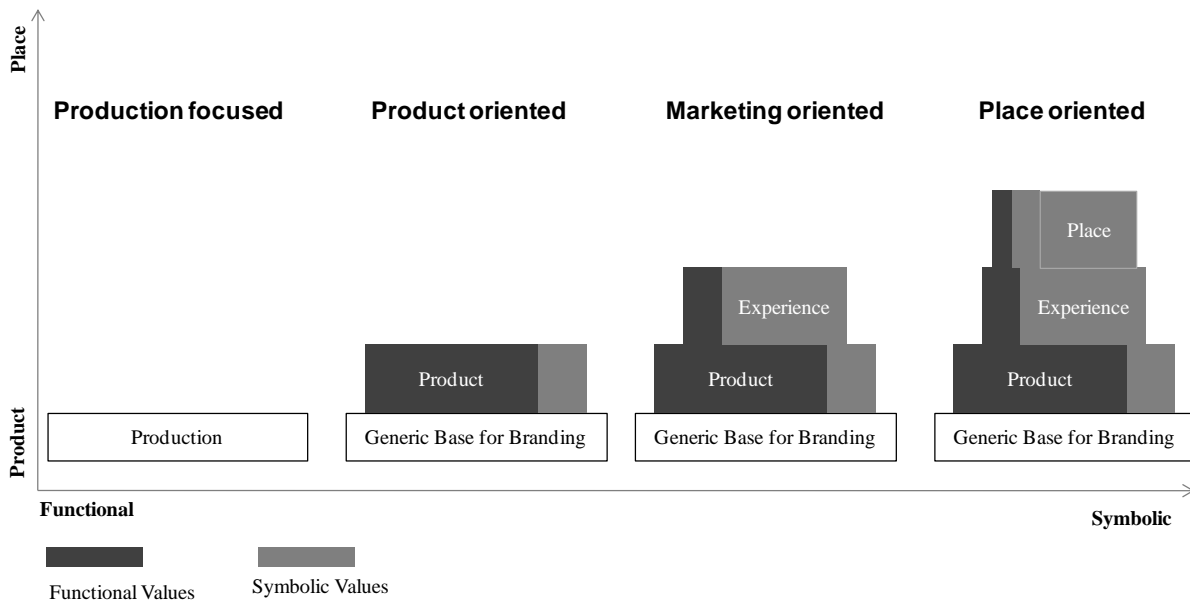
1. The production focused;
2. The product (inward) oriented;
3. The marketing (wine selling/outward) oriented;
4. The customer/place (wine experience/outward-inward) oriented.

The production focused approach has been introduced to include those wineries that are completely focused on production and do not have any marketing strategy at all. These wineries mainly produce wine to be sold on the market or to other producers with a focus on the quantity more than the quality of the wine produced and without using a name or a symbol to represent the winery. The winery is simply a production place and there is no relationship

with the customer or participation to wine exhibitions. The relationship with the territory is only represented by the link with the grape growers. This approach mainly interest the wineries that do not have any interest in promoting their products because not conveying an image of quality;

The customer/place oriented approach is a further evolution of the marketing oriented approach. The wineries identified have a very high and advanced level of branding sophistication and consider their relationship with the territory and the historic landscape as a strategic marketing leverage. The emphasis is not only on the total wine experience, marketing, promotion and merchandising, but also on a new way of communicating with the consumer through a new language made of signs, symbols, cultural marks, aesthetic effects.

Figure 2 Approaches to branding: from production focused to customer/place oriented



Source: our own elaboration, based on Mowle and Merrilees (2005)

In our analysis we concentrate on the customer/place oriented approach to branding. In this approach the wineries develop their brand with an holistic approach that does not only include the product (wine) and the experience at the winery, but also the relationship with the landscape, the historical and artistic heritage, the cultural and socio-economic dimensions. The experiential approach through wine architecture combine all these factors (wine, winery, place), as indicated in Figure 3, using a very high level of branding sophistication and new values made of signs, symbols, cultural marks, aesthetic effects.

Figure 3 Holistic approach: wine, winery, place



Source: our elaboration (2008)

Research design

Our research strategy employs a case study methodology based on qualitative data involving two cases to investigate the recent trend in the wine industry approach to marketing and branding represented by the use of wine architecture strategic leverage.

The research refers to the Eisenhardt (1989) framework of building theory from case study research, which implies the definition of research questions, the selection of useful cases, the data collection methods and analysis of within-case basis.

Case selection

A first list of cases was drawn from the literature (Casamonti & Pavan, 2004; Hartje & Perrier, 2004; Richards, 2004; Webb, 2005) from wineries' web sites and from specialized journals and magazines both about wine and about architecture and landscape design, in order to select later on the ones which could be more relevant for the aims of this research project. The idea was to select a few case studies to be analyzed in depth in order to test our tentative conceptual model and to draw appropriate research questions for further empirical analyses.

The wineries chosen for this research are cases of excellence for wine architecture and have been selected considering the following categories: winery size, winery leadership, winery age, winery location, winery facilities, seeking for diversities in their experiential approach to wine marketing through the place/winery/architecture/landscape relationship.

From the first list of cases, two wineries have been chosen, located in different wine regions (Rioja and Chianti) and different countries (Spain and Italy). In particular we have analyzed the relationships among three main variables:

- a. wine architecture and design;
- b. place, winery and landscape relationship;
- c. visitor/consumer.

Data collection

Document analysis and secondary data collection were used for the research to investigate the evolving domain of wine architecture and the branding approaches of different wineries as follows:

- Recently published works
- Industry conference proceedings
- Company Web sites (winery website and "around the wine" website)
- Wine Regions web sites
- Architecture Web sites
- Wine industry report
- Company reports
- Wine Regions Organisations reports
- Press releases
- Trade magazines
- Newspapers articles

Data analysis

A within case analysis was conducted writing up a summary of each single case in order to gain familiarity with the data for preliminary case level phenomena identification (Eisenhardt, 1989). The summary was based on the above secondary data resulting from a search on each of the two firms.

The wineries

Herederos del Marqués de Riscal

The first winery in our investigation is the Herederos del Marqués de Riscal bodega. It is located in Elciego (Alava) in the Rioja wine region of Spain. The Rioja wine region is in the Northern part of Spain, in the valley of the Ebro river, one of the most highly developed areas in Spain connecting the Basque Country to Catalonia. Rioja includes three provinces: La Rioja, Alava and Navarra. It is divided into three regions: Rioja Alta, Rioja Alavesa and Rioja Baja. Rioja was granted Denomination of Origin status in 1926 and in 1991 became the only Qualified Denomination of Origin (Denominación de Origen Calificada – D.O.Ca.) in recognition of its wines high quality and the strict quality control.

The wine-related industries of Rioja are represented by cooperages, capsules, graphic arts for labels and boxes, presses and bottling machinery.

Tab. 1 Rioja Wine System

Total under vine area	63.500 ha
Vineyard altitude	300-600 m
Average annual production	2.780.000 hl
Wineries	1.391 (1.353 private, 38 cooperative)
Bottlers	586
Main Varieties	Tempranillo (78%), Grenache (11%), Viura (7%) Total red wine 92,90%, total white wine 7,1%
Share of Spanish total production	39,4%
Internal market sales	69,82%
External market sales	30,18%
Major countries of export	UK, Germany, Switzerland, USA
Ho.Re.Ca distribution	63,8%
Wine routes	6

Source: Consejo Regulador de la Denominación de Origen Calificada Rioja (2006)

Rioja is considered a top tourist destination with its six wine routes, the wide range of its cultural sites, its famous cuisine and its excellent wines. Rioja was awarded in 2007 as “Best Wine Region” by the Wine Enthusiast. It is therefore a case of excellence for wine tourism for different reasons:

- * the quality of viticulture landscape;
- * the geographical distance from Bilbao;
- * the presence of leading wine firms;
- * the network of relations created among the actors, both private and institutional;
- * the dynamism at corporate and institutional level;
- * the “Rioja 2020” Strategic Plan.

The Marqués de Riscal bodega in Elciego is structured in different buildings arranged around the original 1860 bodega, now used for cask ageing, which is surrounded by the 1883 bodega, the Vacada Bodega, the Foso Bodega and the San Vicente Bodega.

Tab. 2 Herederos del Marqués de Riscal

Herederos del Marqués de Riscal	
Location	Elciego, Rioja – Spain
Annual Production	4,5 million bottles (Rioja appellation) 3,5 million bottles (Rueda appellation) 1 million bottles (Toro appellation)
Vineyard area	220 ha (owned) 1,280 (managed) – Rioja wine area 181 ha – Rueda wine are 185 ha – Toro and San Román de Hornija wine areas
Export	55%
City of Wine Project	
Location	Elciego, Rioja – Spain
Area	100.000 sq/m
Architect	Frank Gehry
Total cost	\$ 72 million
Period	2000-2006
Facilities	winery/hotel/wine spa/restaurant
Hotel	Operator: Starwood, The Luxury Collection Useful area: 3,200 sq/m Maximum height: 25 m. on four floors Nº de Rooms: 43 bedrooms
Wine therapy spa	Operator: Caudalie Useful area: 1,000 sq/m Services: various and exclusive beauty and anti-stress vinothérapie-based treatments
Restaurant	Useful area: 500 sq/m. Seating capacity: 40 – 120 with terrace Restaurant quality: Haute cuisine Type of cooking: Nouveau cuisine and typical dishes of the area.

The design of this bodega reminds the Guggenheim museum in Bilbao, even though less bewildering than the museum. The structure of the building stands out on the hill in full contrast with the ancient church of the village, with a very strong tradition/contemporaneity and innovation effect. The waves of grapevines are in titanium tinted pink, gold and silver and reflect the landscape around it, multiplying it. The concept of transparent winery can be observed in all the glass passageways putting the different areas of the bodega in communication and giving the consumer/visitor the sensation of always being plunged in the landscape surrounding the bodega. This new project has been thought as a “City of Wine” as it includes Riscal’s corporate new headquarters, a luxury hotel, a top-cuisine restaurant and a wine-therapy spa. The target of this new complex is of course a wealthy, well-educated wine lover who wants to combine his interest for wine with the possibility of having a relaxing and luxury weekend immersed in the vineyards.

The company goal of this project was to conquer the global market's attention and to reposition in the global marketplace through a strong and new brand and icon, using the Guggenheim positive effect. The “City of Wine” has become an icon for the Marqués de Riscal. The logo has been added to the corporate logo and a section has been created in the company website www.marquesderiscal.com called “Vivid Sensations” linking to www.sensacionesvivas.com where a world of sensations inspired by the world of wine is

promoted inviting the user in an intuitive and interactive way to travel with the mouse through a whole world of experiences. The choice of strong international partners for the project, Starwood for the hotel and Caudalie for the spa, has been strategic. The project has received a positive response so far from the media and the number of visitors has more than tripled in two years since the hotel opening in 2006. The innovative project has also stimulated other significant investments in similar projects in the area where famous architects are employed (Ysios Winery, Vina Real Laguardia winery visitor centre, Villa Lucia Wine Thematic Centre, Dinasti Vivanco Museum of Wines Culture), stimulating a form of wine tourism development and wine region regeneration.

Cantina Antinori

The second winery is called Cantina Antinori owned by Marchesi Antinori. It is located in Bargino, in the Chianti Classico wine area, between Florence and Siena in the Tuscan Region. Chianti is the area in which Chianti Classico wine has been produced for centuries. The first notarial document in which the name Chianti appeared in reference to the wine produced in the zone dates back to 1398. The Chianti wine-producing area was delimited in 1932 by ministerial decree and the boundaries have remained unchanged since then. The decree described the district where Chianti Classico is produced as the "the oldest zone of origin.". In 1984 Chianti obtain the DOCG (Denomination of Controlled and Guaranteed Origin) and at that time Chianti Classico was still considered a sub-denomination of the Chianti DOCG. It was only in 1996 that Chianti Classico obtained an independent appellation. Nowadays the DOCG Chianti includes six different sub-denominations: Colli Aretini, Colli Fiorentini, Colli Senesi, Colline Pisane, Montalbano, Montespertoli, Rufina. The Chianti Classico wine area covers 70,000 hectares (7.100 ha under DOCG) and includes the entire territories of the communes of Castellina in Chianti, Gaiole in Chianti, Greve in Chianti and Radda in Chianti and parts of those of Barberino Val d'Elsa, Castelnuovo Berardenga, Poggibonsi, San Casciano Val di Pesa and Tavarnelle Val di Pesa. The Chianti Classico Wine Consortium represents 95% of the entire denominatio and has a strong relationship with the territory and the entire filiera with its 612 members, of which 345 are bottlers. Its tasks are as follows: protection and valorization of Chianti Classico wine and its trademark, promotion, marketing and communication, education and research.

Tab. 3 Chianti Classico Wine System

Total under vine area	7.100 ha
Vineyard altitude	250-600 m
Average annual production (2006)	280.000 hl
Wineries	955 (with DOCG vineneyards)
Bottlers	366
Main Varieties	Sangiovese, Canaiolo Nero, Colorino, Merlot, Cabernet Sauvignon
Share of Regional total DOCG production	10 %
Internal market sales	27%
External market sales	73%
Major countries of export	USA, Germany, UK, Switzerland, Canada
Wine routes	1

Source: Consorzio Vino Chianti Classico (2006)

The philosophy of Cantina Antinori is completely different from the Marquès de Riscal bodega. This is an undergoing project that is bound to be terminated in 2008 and will be the

cradle of the premium and prestige Marchesi Antinori wines, as well as the new Antinori's headquarters. We are still talking about a leading firm for its area, with very deep roots in winemaking tradition and a strong relationship with the territory of the Antinori family through generations. The winery is completely underground and is characterized by two very long fissures along the hill. Everything happens underground on different levels: from the deepest one of the processing and ageing area to the top one where the offices are. Above ground the vineyards and the landscape remain untouched. The light penetrates through the big fissures and the long glass windows with a transparent effect. The visitor can dominate the landscape around and feel at the same time part of it. There are no parking spaces: all the transports are arranged in tunnels connecting the road directly with the winery. The winery is built underground for both wine preservation and energy saving reasons keeping the wine at a natural temperature and for the landscape preservation with a mimetic and invisible effect. The materials used are reconsidered from the local tradition: stone, marble and terracotta. All the facilities have been planned with the idea of reproduce the Tuscan farm activity inside the winery in addition to the wine production, ageing and stocking normal activities.

Tab. 4 Marchesi Antinori

Marchesi Antinori	
Location	Florence – Italy
Annual Production	18 million bottles
Vineyard area	1.800 ha (owned)
Turnover	127,5 million €
Export	55%
Year of foundation	1385
Cantina Antinori - Bargino	
Location	Bargino, San Casciano Val di Pesa, Chianti – Italy
Area	41.000 sq/foot (23.000 underground)
Architect	Studio Archea, Marco Casamonti
Initial Total Cost	€ 42 million
Period	2005-2008
Facilities	Museum Oil mill Barriquerie Wooden oven for bread making Restaurant Auditorium for 200 people Didactic itinerary for the visitors through the processing and aging areas Vinsanteria for passito production Wine shop

The visitor profile this new winery aims at attracting is different than the one in Marqués de Riscal. It is in fact a wine lover who wants to discover the link between wine production and the tradition of the territory where it is produced and who appreciates the contemporary architecture as long as it is planned respecting the landscape and employing the local competences and using local natural materials. The numerous facilities in the project are all planned so that the visitor can watch and feel part of the production activities, which are kept at the same time independent from the visitors' itinerary.

The project is bound to finish in 2008. At present, we can therefore only register the positive effect on media of this remarkable investment, which follows the company strategy

to build a world around wine production made of different activities and services all linked to the wine region and the typical products (restaurants and winebar in different European Cities, delicatessen, wineshop and osteria, countryhouses, Accademia Antinori, which aims to promote and celebrate art linked to Tuscany and winegrowing) as indicated in “Attorno al vino” the website linked to the company website www.antinori.it

Conclusions

The analysis of case studies reveals that winery architecture is effectively an emerging frontier in the strategic wine marketing approaches of the recent years. This trend responds to the needs of both producers and customers:

- on one side the global competition among wine producers leads to the search of innovative approaches to marketing, based on brand awareness and leveraging on the brand as a vehicle of product characteristics (quality, product uniqueness), of territory uniqueness, of winery uniqueness (tradition and innovation, heritage and novelty). The latter can be properly communicated and “lived” in terms of direct customer experience through the use of winery architecture;
- on the other side, customers preferences and behaviors evolve quickly also in the wine market. The quest for variety and quality is now paralleled by a quest for holistic wine experience, at the crossroad between tourism (natural, cultural, industrial), wellness and food/beverage experiences. In addition to this, the aesthetic interest and sensibility has grown significantly: the design contents in different industries and product has become a key strategic leverage (from apparel to food and beverages packaging, from electronic devices and home appliances to phones and cars, etc) and has reached the wine industry. The first strategic move of many producers has been based on bottle and label design but now winery architecture needs to be considered. Moreover the interest of visitors and the power of attraction of innovative architecture has rapidly grown in recent years as the case of the Guggenheim Museum in Bilbao suggests.

Wine architecture addresses the hedonic and aesthetic needs of consumers amplifying the wine experience and supporting customer relationship development. This amplification of the wine experience is obtained through a blend of product experience (wine tasting on site, in a controlled environment where tasting is mediated by local experts and appropriate environmental and cultural context), landscape experience, with its territorial uniqueness and the heritage behind it, and finally winery experience in terms of how the winery is capable of introducing the visitor to the production and storage world, to the heritage and the innovation in the wine production, and communicating to the visitor the brand identity behind the architecture.

Winery and landscape can be considered cultural markers, which contribute to the perception of brand identity regarding both the wine region and the winery. The two case studies establish two different model of relationship between winery architecture, wine landscape, the target customer and the wine experience proposed, thus showing the potential effectiveness of this approach for customer-place oriented strategies and winery branding.

The main limitation of this work is represented by the difficulty in generalizing evidence from case study research and by the lack of longitudinal data regarding visitors, growth in brand awareness, perceived brand identity following these innovative strategies. This is because the cases reported are all very recent and in most cases the new wineries have not been completed yet. It is our intention to monitor in the coming years all these phenomena on a global scale and to collect customer data, in order to provide a proper assessment about the effectiveness of these strategies.

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