

The Challenge of Cohesive Brand Positioning: Convergence of Innovative, Modern, Traditional, and/or Classic

Daniel J. Flint

University of Tennessee, United States of America
dflint@utk.edu

Paola Signori

University of Verona, Italy
paola.signori@univr.it

Susan L. Golicic

Colorado State University, United States of America
susan.golicic@business.colostate.edu

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- *Purpose: The purpose of this paper is to describe how managers in the wine industry perceive their strategic brand positioning choice options and integrate them into a cohesive brand story.*
 - *Design/methodology: A qualitative study of 166 individuals, including 99 in-depth interviews, from 153 wine industry firms from nine regions around the world was conducted over the course of four years to determine marketing and supply chain strategies. Data consisted of depth interviews, organization documentation, website information, operation observations and photographs. The data were analyzed using accepted practices from grounded theory and ethnography.*
 - *Findings: Data interpretation revealed four overarching strategic brand positioning options (innovative, modern, traditional, and classical), each of which could be communicated via one or more of 16 controllable variables or characteristics (5 marketing processes, 2 supply chain management processes, winery operations processes, 5 product characteristics and 3 organizational characteristics). Beyond this, managers experience tension as they attempt to make choices related to these four options, some of which may seem diametrically opposed to each other.*
 - *Practical implications: This study offers a means for wine brands to diagnose their positioning efforts and better determine the cohesiveness of their brand positioning efforts and stories.*

Key words: brand positioning, brand story, grounded theory

1. INTRODUCTION

Brand positioning is a well-researched core strategic task for marketing managers (Das et al., 2009) that is as challenging as ever within the wine industry. With over capacity, global competition, cost containment challenges, and changing consumer desires, winery marketing managers must make potentially risky strategic branding choices. It is clear that brand positioning is an ongoing strategic challenge requiring the careful integration of various media forms especially as brands grow (e.g., Seaford, 2012).

The original research objective was to answer the question: how do wine managers approach their customer and competitor environments as they attempt to grow their businesses? This empirical paper reports key findings from a four year immersion in global wine regions designed to explore contemporary wine marketing and supply chain practices as winery managers try to survive and grow their businesses. Within theory-building, inductive aspects of the project, we discovered strategic practices that were sometimes comprehensive conscious choices while at other times were ad hoc and lacking cohesion. Thus the original research question evolved into: how do winery managers develop and leverage competencies in their brand positioning? Specifically, managers were struggling with positioning their wine brands, product lines, wineries, and even regions in terms of being innovative, modern, traditional and/or classic. These positioning options, the challenges managers face, and the 16 ways discovered in which they attempt to position were not sought *a priori* in this project. The challenge of creating a cohesive positioning message through these four specific options emerged through the interpretive process across multiple sources of data. Thus, although the next sections describe relevant literature on themes that emerged, they were explored only after they emerged in the theoretical framework constructed from the field data.

1.1 Strategic Choices in Brand Positioning

Brand positioning involves making strategic choices about not only what to emphasize in market messaging but also in what to actually do. In today's environment, what a firm does reflects on what a brand means and can be discovered and disseminated widely and rapidly through social media. Strategic decision-making is about making well thought-out choices (Porter, 1991) and when done effectively can be viewed as a dynamic capability serving as a differentiating resource (Eisenhardt and Martin, 2000). Managing the choice process is the challenge, and there are numerous approaches from which to choose. As brands expand their reach to foreign markets, they must choose for instance the extent to which they emphasize their foreign as well as adapted localized dimensions in brand positioning (Eisingerich and Rubera, 2010; Kipnis et al., 2012). The country of origin for wine brands does have an effect on consumers' perceptions of quality, price and preferences and as such is an important characteristic for brand positioning (Guidry et al. 2009), but sometimes this country of origin effect constrains rather than helps. Beyond the obvious quality-related indicators connected to a brand that all wines try to include in their positioning, creating meaningful consumer experiences has become a powerful means of contributing to a brand's position (Addis et al, 2008). Finally, key aspects of wine brand positioning are authenticity and credibility which help consumers match brands with their desires by believing in and trusting them (Beverland, 2005; Mileti et al, 2013; Napoli et al, 2012). In this sense, being authentic has in part to do with keeping with traditions, but is largely a subjective assessment of being true to one's claimed identity.

1.2 Innovation and Brands

What does it mean to position one's brand on being innovative? Innovations can occur in products, services, and ideas and are perceived as innovative when they are new to the adopter and enhance the functional or hedonic benefits one receives, i.e., help create greater customer value (Flint, 2006). What is seen as innovative is in the eyes of the beholder and lies within context such as an industry, product class, or consumer group, and is dynamic since what customers value changes. Innovation is often critical to brand survival, and can be mapped along two dimensions of incremental/radical and market driving/market driven and assessed on how well innovation efforts fit with brand positioning (Beverland et al. 2010). Innovation can enhance brand personality if managed correctly (Bhat and Bowonder, 2001). Yet, incoherent or brand inconsistent practices can result in consumer brand confusion. Although brand confusion is often examined through a legal lens where one brand infringes upon another's identity, sometimes brand confusion emerges unintentionally by the efforts of the brand's management team. Wine branding has become so complex that the potential for confusion is high.

2. METHOD

This empirical research is guided by ethnographic and grounded theory traditions (Arnould and Wallendorf, 1994; Glaser 1992; Strauss 1997) as part of a large, multi-year, multi-region project examining contemporary marketing and business practices in the wine industry. Data collection methods included observation, meetings with 166 organizational representatives, formal in-depth interviews with 99 senior managers and over 1100 documents and artifacts from wineries. Formal interviews ranged between one and two hours and were primarily conducted in English. The regions include the United States (Napa/Sonoma – 19 interviews, Oregon/Washington – 18 interviews), Australia (Barossa Valley – 11 interviews, Margaret River – 17 interviews), New Zealand (Marlborough – 11 interviews), and Italy (Veneto – 12 interviews, Tuscany – 11 interviews). Managers from these well-known wine regions were experienced, articulate and willing participants, representing young and established, as well as large and small wineries. Appendix A provides the participant characteristics. Interpretations followed classic ground-up, open coding of verbatim interview transcripts, marketing collateral (brochures, presentations, websites, business cards), and winery artifacts and observations (documented through photographs) in line with grounded theory which seeks to identify how actors approach problems in their social environments and create meaning through their social interactions (Glaser, 1992; Strauss, 1987). Open codes were collapsed into concepts and categories that were integrated into a theoretical framework. The emergent framework (Figure 1) depicts key concepts that emerged unprompted through these interpretive processes. The insights provided in the findings section reflect interpretations of all of our data and are far more than simply what managers 'told' us. Specifically, interpretations reflect many hours of contemplation of what seemed to be 'going on,' stories managers were attempting to convey to us, comparison of multiple data forms, and reconciliation among the three researchers of alternative possible interpretations.

3. FINDINGS

3.1 Innovative, Modern, Traditional, and Classic

Interpretations of the data reveal that winery managers are under constant competitive pressure, regardless of the size of the winery or the region. Competition is stiff internationally for those attempting to grow their market share in foreign regions as well as locally for those merely trying

to survive. This constant competitive pressure challenges brands to position themselves clearly and to find a niche within which to operate. Participants in this study revealed their positioning desires through comments about their ‘story,’ what their winery and labels ‘stood for’ in the marketplace, or what they were ‘trying to be known for.’ Being known as innovative or traditional emerged as common positioning options. This became apparent when comparing wineries in Italian regions with those of New Zealand. This in itself initially was not unique or interesting given that culturally New Zealanders like to be known for experimenting and trying new things, and Italy is proud to be home to some of the oldest wine regions known. What emerged through deeper interpretations was that many Italian managers were also focused on innovation; in fact wineries everywhere data were collected discussed innovations that they were pursuing in various forms, primarily because they felt they needed to as a way of responding to competition. Additionally, managers at many wineries globally were also discussing the importance of tradition. Furthermore, in many cases they were the same managers discussing positioning efforts on both. Then, as interpretations of participant interviews were compared with interpretations of content expressed on websites, marketing collateral, architectural style of wineries and tasting rooms, and even business cards (e.g., font style), it became apparent that these managers were wrestling with a form of tension, trying to decide amongst four options on how best to position their labels, their product lines, their wineries, and in some cases, their region. These four options were being innovative, modern, traditional and classic (Figure 1).

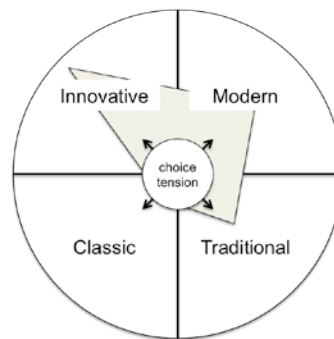


Fig. 1: Options for Brand Positioning

In some cases managers seemed to have a clear brand positioning on one of the four. Often though, we found combinations of two or more of the four positioning options, some appearing rather contradictory. Thus, in some cases messages created coherent stories and clear positioning while often inconsistencies led to incoherent positioning.

Looking only at innovation and tradition, in some cases, managers recognized the delicate process of selecting aspects on which they could or even should be innovative (e.g., wine, packaging, aging process, growing processes, closures, location) while at the same time, retaining those that should remain traditional. Sometimes this debate escalated to managers at multiple wineries within the same wine region, where opinions strongly varied on what were important aspects of ‘tradition’ for the region’s brand positioning. Additionally, being traditional meant something different to participants than being ‘classic,’ and being innovative meant something different to them than being ‘modern.’ This insight led to the development of the four-quadrant figure representing positioning choices from which managers seem to intentionally or unintentionally select, with many selecting various combinations of two or more of these four.

3.1.1 *What do innovative and modern mean?*

The following participant passage may best articulate a view of innovation and its importance to business continuity.

“Innovation for us is one of the most important things to survive. One is in the production, studying new opportunities using the past, methods to reinterpret in different ways the old product, innovation is also service to customers and suppliers, new production methods or new services to the customers. We are able to reach the final customers by big investments in sales and distribution...” [Paulo]

Evidence of innovation was found in products (e.g., the wine itself, packaging/bottles, labels, closure mechanisms), processes (e.g., marketing, winery operations, supply/demand chain management, CRM tools), and organizations (organizational structure, employee profiles). Examples such as adopting and experimenting with wine in a box, new corks or closures, using QR codes on the labels, and embracing social media. As one participant claimed, they were “...adapting wines to meet the needs of local markets globally” [Luciano], representing a market-driven form of product innovation.

“What we’re going into now is a lot more packaging innovation. So a lot more focus about the occasion and also the visual cues that consumers will see.” [Aaron]

Being innovative meant something different from being ‘modern.’ Where innovations were changes that were new and improved ways of benefiting customers and as such aiding in differentiation, ‘modern’ to study participants meant contemporary in terms of style. A modern style is reflected in architectural design of tasting rooms, bottle labels, websites, advertisement imagery and even the font on business cards. Equipment and processes can be modern and not necessarily innovations. It is also reflected in the comments managers made about their brand stories or their processes. For example, one Italian participant emphasized that he was driving his webdesigner to make the site to “have a very modern look at feel.” [Marco]. One California owner emphasized the modernity of his attitude, wine cellar and visitor center [Chris]. The public relations director of a large Italian conglomerate winery described the modern look and feel of a spritz product they launched and all of the contemporary marketing that went with it [Luciano]. Finally, a participant at one of the fastest growing wineries in New Zealand emphasized it’s state of the art processes, brands and marketing efforts [Paul].

3.1.2 *What do traditional and classic mean?*

Often contrasted with being innovative was being traditional. Although traditional can mean how the wine tastes and staying true to a varietal, it also referred to traditional wine making processes, grape growing processes, ways of doing business, and the look of bottles, labels and closures; it means familiar. It is not surprising to find managers at wineries in the Old World concerned about being traditional or making traditional wines, but this study revealed managers in other regions also speaking about tradition even if using different words. For example, participants would speak in terms that reflect “this is how we do things here in this region” or “ever since the beginning [which may be the 1970s in California, New Zealand or Australia] we [meaning wineries in the region] have respected the land and what it could best produce and followed certain expected ways.”

Being ‘classic’ was different from being traditional. Classic implied a certain quality level as well, something beyond traditional. Being classic is critical for differentiation if ones wines represent the original and highest quality producing regions such as within Tuscany for Chianti Classico or Montalcino for Brunello. That said, even wineries elsewhere drew on the notion of classic for positioning. For example, one Australian participant explained “we started to use it because this is the classic French Burgundy bottle so we wanted to use it for Chardonnay and Pinot Noir.” Yet, he also described the “classic American business view” implying that classic meant the standard to which others would compare, be it a wine or a way of doing business {Donna and Alan}. “We have some varieties which are siblings which originally started out as a classic dry white, it’s what this area is known for...,” [Doug]. Even the way one produces and sells wine can be classical as one manager explained “all of my training is French classical training” [Randy]. Yet, one Australian participant explained that “people are going away from using the term classic..” further emphasizing the dynamic nature of brand positioning and the importance placed on certain forms of positioning.

3.2 Trying to be cohesive

The challenge winery managers are facing lies in deciding on what attributes or processes they should innovate, while simultaneously deciding which ones to retain as traditional, which characteristics if any constitute being classic and which ones if any should be modern. Hundreds of examples from the data reveal this challenge managers were facing.

One owner of a winery well known for being unique in the region explained that “innovation is establishing and growing traditions...looking back at the past and getting the best of what happened” [Antonio]. This theme of resurrecting old traditions as a means of being innovative appeared numerous times in the data, such as “...it’s an innovation recovering the ancient wine making method...” [Cesare]. Another participant described how they were creating “classic” wines, while also wanting to emphasize the “traditions” of its 100 years of family ownership and yet encouraging website designers to create a “very modern look and feel” [Marco]. Others would develop innovative processes, yet market wines as if they were local, small, boutique and traditional. One website positioned its wines as traditional wine innovations whose bottles looked very modern.

One participant stated that brands “...need to have a personality, have a story...be really authentic, true to the place...[we’re] trying to be modern traditionalists...and you can’t communicate it if you don’t know who you are” [Linda]. Another participant also claimed “...it comes down to the brand story...the perception that differentiates...There is a clear focus in New Zealand on sustainability, innovations in carbon footprint and so forth...in ownership our innovation is that we are the only Maori-owned winery” [Ted]. In the New World, it could be that a “tradition is to grow with the market...to adapt and innovate” [Dan]. According to managers at New World wineries, tradition seems to mean the norms of behavior developed by those who have been in the region or making that varietal the longest, the “...normal way of doing things” [Vick]. Traditional and also modern for a manager in Australia was to explore various ways to create wines that best ‘interpret’ the soil while making ‘classic’ high-end wines [Roger]. The data representing the act of wrestling with combinations of these four positioning options is extensive. Participants often used phrases like “new traditionalists” or “integrating

innovation and tradition.” Even industry writers do it when they claim for example that a Brunello di Montalcino is both “modern and classic” (Larner, 2013). Although tools such as multidimensional scaling have been useful for positioning on multiple attributes since the 1970s (Doyle, 1975), positioning by combining such supposedly opposing concepts as these creates a new challenge currently underexplored. The call is still the same though, to create a brand that is coherent in totality and offers a unique blend of attributes (King, 1973).

Interpretations revealed that participants were relying on combinations of 16 different ways in which they were conveying the position of their brands, wineries and regions. Table 1 lists them merely to highlight that managerial tension felt while trying to position on one or a combination of the four options was manifested through decision making about each of these 16 variables.

General Area of Focus	Specific Forms
5 product characteristics	wine itself, bottle, label, closer, package
5 marketing processes	digital media, printed collateral, interpersonal interactions, events, architectural design
Winery operations	e.g., vineyard management, fermentation, aging,..
2 supply chain management processes	network structure, relationship management
3 organizational characteristics	location, organizational structure, employee skill

Table 1. Variables Discovered that Communicate Brand Position

4. CONCLUSIONS AND IMPLICATIONS

4.1 Literature and theory

This study contributes to the brand positioning literature by describing the challenging realities of positioning a complex emotional product category with a great deal of history immersed within an intense competitive environment along multiple, sometimes opposing, characteristics. The contribution lies not merely in identifying the choice variables but in the tension management processes of individual managers as they wrestle within their own minds as well as with industry colleagues about the best combinations to create a strategic differential advantage. The standard battle between wine ‘innovators’ of the New World and ‘traditionalists’ of the Old World that is well documented (e.g., Bartlett, 2003) is not an accurate picture. What is new, is how complex and blurred brand positioning has become as a great deal of innovation emerges from young and old, and large and small wineries in both the Old World and New World regions and as what it means to be traditional changes throughout these regions.

4.2 Practice

Managers whose decisions affect brand positioning ought to examine the numerous ways in which they currently emphasize concepts of innovation, modernity, tradition and classicalness. Figure one can be used as a diagnostic tool if the extent to which market communication emphasizes each of the four is mapped onto it, similar to the hypothetical trapezoid presented in the figure. Going further, the extent to which each of the four options is being communicated to the market might be determined by examining the decisions and communications about each of the 16 variables identified in Table 1. Future research should delve more deeply into these 16 and others and explore the relationships between various combinations of them and the cohesiveness of the brand positions that result.

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**APPENDIX
PARTICIPANT PSEUDONYMS AND INFORMATION**

Pseudonym	Descriptors
United States	California, Oregon, Washington
Andy	Owner and Winemaker for small Sonoma winery specializing in a single varietal
Ben and Jerry	Director of Winegrowing for large Sonoma winery; big focus on sustainable practices in upstream end of supply chain Winegrowing Technician for large Sonoma winery; responsible for working directly with suppliers on sustainability requirements
Bob and Barbara	Co-owners; winemaker/grower and marketer/tasting room manager; married; owned the vineyard for 20 yrs, making wine for 16; he is a former attorney, she a former bank manager and city planner
Chris	General Manager of small Sonoma winery with goal of serving customers through the cellar door only; background in sales with large wine company
Dan	Marketing manager; moved to wine region 6 years prior; first position was with non-profit association representing 370 wineries; now focused on Internet marketing strategies at current boutique winery for 4.5 years
Jeff	Customer service (tour guide) for a very large winery; a recent college graduate who had interned at the winery while in his undergraduate program; knows the history of the winery well
Ken	Winemaker and General Manager of very high end winery; has significant branding/marketing experience at another high-end winery owned by a major corporation
Kim	General Manager of an importer of wine to the US (vertical integration from a wine company); tenacity got her into the industry with another importer
Linda	General Manager and Director of Marketing; she was in conflict resolution for International non-profits; significant experience as senior marketing officer at various wineries
Mike	Senior Director, Operations Planning of one of the largest wineries in the world; has spent 23 years at the firm, 17 of which were in sales; now deals with sales and operations planning, production efficiency issues
Paul	Operations manager at a smaller but high-end winery that has been acquired by a number of larger corporations over the years; he is also a grower
Shawn	Apprentice winemaker and marketing; small winery with ten employees; she worked at two wineries prior to this job where she has worked for nine years
Scott	Marketing coordinator; grew up in wine business; spent time after college in restaurant and bar management; spent a number of years putting together promotions and events for wineries
Sid and Nancy	Co-owner and Marketing Manager for small Napa winery; prior marketing experience and good with customers; started a second company with friends Co-owner and winemaker for small Napa winery; long family history in CA winegrowing and winemaking
Susan	VP/General Manager of unique winery known for blending passions for wine and art; has worked for winery for 8 yrs; prior to this spent 11 yrs as director of operations for the organization that does marketing and sales for this winery
Teresa and Paul	Sales Director for midsize Napa winery; trained in sales and marketing; feels point of difference is location of tasting room Winemaker for midsize Napa winery; brought in to focus the wine offerings but feels they have actually gone in opposite direction
Albert	Co-owner and Winemaker for a small winery in the Willamette Valley; had been a farmer and managed vineyards when he decided to also make wine
Alex	Vineyard Manager for a mid-size winery in the Willamette Valley; has several years of framing experience and is from the local area
Barry	Owner and winemaker for a small winery in Walla Walla; wanted the lifestyle and to be his own boss
Betty	Operations Manager for a small winery in the Willamette Valley; winery started as a hobby farm; she is working to officially build the brand and grow sales

Cary	Owner and winemaker for a large winery in the Columbia Valley; background in sales and marketing; saw a business opportunity and started business with a definite plan
Carol	Marketing and Sustainability Manager for a large, publically held winery in the Willamette Valley; works a great deal on sustainability issues and how these can be communicated to customers
Carrie	Marketing Manager for an older, mid-size winery in the Willamette Valley; brings marketing experience in the industry from other countries
Darren	Owner, Winemaker and Vineyard Manager for a small winery in the Willamette Valley; had grown up on a farm and lived in the area and thought this would be a good venture
Derek	Winemaker for an older, mid-size winery in the Willamette Valley; very concerned about sustainability and trying new things/being the first/leading the region
Joey	Owner and winemaker for a small winery in Walla Walla; started the venture after business school and travel to Italy; has the support of other family businesses in the area (real estate) to help with funding
Marcus	President of a contract vineyard management company in the Willamette Valley; has numerous years experience in farming and the wine industry; specialize in managing sustainable vineyards
Peter	Owner and Winemaker for a small winery in Southern Oregon; had made wine in his basement when he was in business; considers himself to be an excellent blender and believes this is key to making good wine
Rick	Operations Manager for a custom winemaking facility in the Willamette Valley; had no prior industry experience but interested in operations and wine and got in through a friend
Robin	Tasting Room Manager for a large winery in Walla Walla owned by a business in Seattle; hires people based on personality and interaction with people, not their knowledge of the industry/product
Sam	Director of Marketing for a large winery in the Willamette Valley; works on marketing the brand; takes on side projects to build the brand and not just around wine
Steve and Susan	Owners and winemaker of a new, small winery in the Willamette Valley; both have business backgrounds and wanted to start their own business; have made decisions based on what they like in wine
Tristan	Operations Manager for a mid-size winery in the Willamette Valley; brings industry experience from different countries
Australia	Western Australia, South Australia
Brent	General Manager for the only winery positioned with a view of the ocean in Margaret River; he was hired by the owners due to his background in sales and marketing and has since taken over management of all operations
Brandon	Senior Winemaker and owner of a contract winery currently serving more than 6 Margaret River wineries; he has over 20 years of winemaking and vineyard management experience with well-known wineries in the Napa and Western Australia; he has degrees in agricultural science and viticulture and enology (UC, Davis)
David	Owner of an organic vineyard and winery in the Swan Valley; he does all of the viticulture and winemaking in addition to managing the construction of all facilities (e.g., barrel room, cellar door) on the property; David chose to follow the organic model due to a lifelong sustainability philosophy
Donna and Alan	Owners of a small, premium, well-respected winery in Margaret River; Alan joined as the winemaker following completion of his oenology degree and when they made the decision to purchase the business, Donna became involved with the sales and marketing; they have a great deal of knowledge of the evolution of the industry in Margaret River and hope their children continue the business
Donald	Former owner and manager of a large Chinese owned winery in Margaret River; Donald built the contemporary winery 10 years ago utilizing state of the art equipment; he views producing wine from a business point of view, and the facility is clearly geared toward mass production of wine
Doug	Owner of one of the first wineries (and now one of the largest) in Margaret River; was

	mentored by a well-known winemaker after he was told that the property he had purchased would be ideal for growing grapes; due to his philosophy of 'wine, food and art', Doug has played a large role in making Margaret River a wine and food destination in Western Australia
Gerard	Owner, Viticulturist and Winemaker for a small, new winery in Margaret River; a former geologist, Gerard and his business partner started this to provide a lifestyle and are less concerned about making a profit; he views wine as an expression of himself, the business and the property
Greg	Co-owner of wine bar and bistro in the town of Margaret River; Greg has many years experience in the wine and hospitality industries and also owns a vineyard and winery in the area; he approaches business with the philosophy that he wants to influence not only the sale but also consumption experience with the product; the wine bar is the only one of its kind that lists/stocks wine from every area winery
Jack and Steve	Owner and chef of an Italian themed restaurant in an upper class neighborhood in Perth; he admittedly does not know much about wine but trusts his current sommelier to make all wine decisions to accent and accompany his menus (primarily Australian and European wine) Steve has been the sommelier at Jack's restaurant since shortly after it opened; he learned about wine growing up in Europe; he hopes to move to Melbourne where the restaurant/wine culture is more advanced than Perth
Karl	Karl is a married, practicing attorney in his 40s that consumes wine 1-3 times per week, primarily as an accompaniment to meals
Mark	Owner and manager of specialty bottle shop in Perth; the bottle shop is the most well-known in the city; he started in the wine/alcohol industry when his family came from Italy nearly 30 years ago; he is passionate about wine and educating people about wine and does this through events held in the cellar of the bottle shop; he has an extensive collection of wines from around the world, primarily from Australia and Europe
Max	Manager for a small organic vineyard and winery in Margaret River; he went to work for his friend that owns the vineyard due to their synergistic philosophy towards sustainability; they are not interested in having a cellar door and selling a great deal of wine but are more interested in being able to follow their livelihood
Randy	Co-owner and chef of the first wine bar to open in Perth; he and his business partner also have a bistro in Margaret River; he is originally from Australia and classically trained in French cooking; he trusts his wine manager and sommeliers to choose all wines for their extensive wine list (primarily Australian and European)
Roger	Technical Director for a family-owned wine group that owns 4 wineries in Western and South Australia; Roger has a chemical engineering degree and a Masters in Food Science and Enology (UC, Davis), spent time in France, and oversees the winemaking operations of all of the wineries
Sam	Co-director of a group of retail outlets that sell rebranded "unbranded" wine purchased from Australia wineries; the business is modeled after a similar business in Melbourne; he and his wife (co-director) did not have any experience in the wine industry before starting the business
Wade	Wade is the Winemaker for a mid-sized winery, known primarily for their restaurant and location, in Swan Valley; he is educated in oenology and viticulture and spent time in France and California before returning to Perth; Wade would like to do experiment more with the wine, but the owners just want basic wine to support the restaurant and event business
Wayne	Wayne is the Chief Executive of a non-asset based wine business; he developed the business based on a desire to sell wine (bypassing the romantic urge to have a vineyard and winery) while working for himself
Aaron	National Supply Manager for the largest brand of a large, public brand holding company; brought in from a similar company due to his supply management experience
Allie	CEO/GM of older family producer; brought in for financial experience and 'outside' views but no background in industry

Art	Sales and Export Director for a small, private, relatively new winery that focuses on regional varietals only; no formal business education but background in hospitality
Cameron	Manager of Sustainable Wine Programs with large, older family producer; an 'internal consultant' that has created and implemented programs from the ground up due to advanced degree research (no prior background in industry)
Clementine	Marketing Manager for government association responsible for marketing, research and tourism; background and formal training in industry (family growers)
Garth	Owner of small, family estate producer; no prior background in industry – wanted to own a vineyard; focuses on premium wines only, no individual cellar door
Jonathan	Owner of small, family estate producer (purchased recently); prior background as an entrepreneur with desire to own a vineyard
Maddie	Operations Manager for a cellar door for several wine producers; background in the industry (family of growers/producers)
Matthew	Executive Chef of high end restaurant that specializes in local food; menus built nightly around wines
Sebastian	CEO of (regional) governmental association responsible for marketing and research; background in industry through family (growers) and various positions with producers
Stefan	Manager of Business Systems and Sustainability for large, public producer; brought in for IT experience and has pushed sustainability based on personal values
New Zealand	Marlborough
Adam	Wine maker for higher end winery; responsible for managing supply and distribution relationships as well; key manager designing and coordinating minimum carbon foot throughout the supply chain working with major U.K. retailer
Ann	Marketing director for small winery; decade of experience in marketing for large, Australian winery; formal brand management training
Bob	Operations and marketing manager at family owned winery in Canterbury Region; returned to help add business/marketing discipline and run operations several years prior to the interview; helps sets strategy for organization
Cindy	Founder, owner, chief chef at high end restaurant in Christchurch; also runs a sommelier school and other retail and product ventures
Gina	Sommelier at Cindy's restaurant; formerly trained in wine selection and food pairings; responsible for wine recommendations for patrons
Jeff	Part owner in largest, most successful wine retailer in Christchurch; works to create customer-oriented atmosphere and very knowledgeable about wines
Jim	Partner in multi-brand wine company responsible for strategy, positioning, partnerships and operations
Mike	Austrian sommelier for a high-end restaurant in Christchurch; very knowledgeable about menu, wide variety of wines, and customers' preferences
Paul	Senior operations manager at large and one of the fastest growing winery in the region; responsible for setting up state of the art operations, acquiring state of the equipment
Ted	Chief Executive Officer for boutique winery; significant experience in Australian wine industry; supply chain specifically designed to leverage and support the indigenous (Maori) ownership of this winery
Vick	Chief Financial Officer of wine holding firm managing four major brands; has a long history in the wine industry both as manager and producer/owner; highly involved in strategic decision making for firm
Italy	Veneto, Tuscany
Alberto	Owner of a high end restaurant in Verona; focus on local dishes with mostly local wines on the list constructed based on customer requests
Antonio	Owner (2 nd generation) for a small winery in Veneto; educated in the UK; strives to be different than the large companies and feels consumers should taste the wine
Cesare, Barbara, Francesca, Marco	Owner (7 th generation), export sales and hospitality for a large winery in Veneto (#17 in Italy); focus is on tradition and marketing the region and its history

	Various sales and support staff for Cesare
Dante	Sales Manager and Winemaker (3 rd generation) for a small winery in Veneto; focus on making a regional (and relatively unknown) varietal
Fabio	Owner (3 rd generation) and winemaker for a small winery in Tuscany; has increased exports greatly and combined selling wine with in-home paired course dinners in the US
Francesco and Francesca	Sales Manager and Marketing Operations for a mid-size winery in Veneto (#65 in Italy); neither is part of the family dating back to the 1800s who had the attitude that marketing was not necessary for sales
Giorgio and Gianni	CEO and Sales and Marketing Manager for a large winery in Tuscany (#14 in Italy); they are not part of the family and are more concerned with the management of the business while the family is concerned with the product
Ilenia	Owner (3 rd generation) for a small winery in Veneto; associated with an agriturismo; more interested in the way New World wineries are run rather than the tradition of typical Italian wineries
Luciano	PR director for large winery in Veneto (#10 in Italy); part of the 7 th generation family through marriage; company has grown the last several years through acquisitions
Marco	Owner (4 th generation) of a small winery in Veneto; he manages the business and marketing aspects while his brother manages production
Paulo and Ivan	Consultant and Viticulture Manager for a large brand co-operative in Veneto (#1 in Italy); the company has grown quite a bit in the last few years
Roberto	CEO of a mid-sized brand co-operative in Veneto; have only recently begun to strategically sell wine and are now investing in new products and product lines
Alfredo	Owner/Director of small family winery (second generation) in Tuscany; differentiates themselves (from larger producers and traditional producers) with the style of their wine and has broad vision for the region in addition to his business
Carlo	Oenologist for a brand owned by a large brand co-operative (#1 in Italy); they are researching precision agriculture as a pilot for the co-operative
Claudio	Director of Marketing for a medium sized, centuries old winery in Tuscany that has changed ownership from the family to publically held spirits companies to the family again
Cristina and Cristian	Promotions and Communications Manager and Agronomist for a medium sized, centuries old winery in Tuscany; experimenting with grape clones
Daniele	Managing Director with siblings of a family winery in Tuscany; the property was an old monastery and has been in the family for over 150 years
Dominica	Managing Director of a medium sized family winery (second generation) in Tuscany; one part of a larger farming based company
Ernesto	Independent sales representative for several Italian wine brands; sells to restaurants in Florence
Gianni	Director of a local area consortium of wine producers
Jovanni	Owner/Director of small, older family winery in Tuscany; relies on relationships rather than marketing for sales
Luca	Managing Director (with brother) of a medium sized, centuries old family winery in Tuscany; they conduct a great deal of research and experiment with their viticulture
Paola and Laura	Marketing Director and Tourism Director of very large foreign owned family winery in Tuscany; they concentrate on marketing strategy for all markets except US (where there is an import arm of the company for distribution)