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Marchés du vin et cultures de consommation

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Case study of five Napa Valley wineries

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Article publié le 15 décembre 2021.

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Methodology

Findings and Conclusion

Firstly, we would like to express our most sincere gratitude to our thesis adviser Prof. Haiyan SONG for his continuous guidance and support on our study. His inspiring and creative way of teaching and immense knowledge have guided us through the whole journey of composing the report. We could not imagine half of the success of the report without his precious help.

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Last but not the least, special thanks to Dr. Ksenia KIRILLOVA and Dr. Hengyun LI for teaching us Research Methodology, which helped us tremendously to build the solid foundation for being qualified researchers. We would like to take this opportunity to thank them for broadening our minds in the academic world.

- 1 With the constant development and involvement of technology, the way that people access information, make purchase, communicate and interact with others are transforming from the traditional way to a more digitalized way. The global online population was around 4.1 billion by the end of 2017, with the amount of internet user projected to hit 4.2 billion in 2018 around the world (Internet World Stats, 2017). With regards to the wine industry, there are increasing number of wineries attempting to approach their target customers by using different social media platforms so as to realize the retaining of existing customers and attracting of potential customers. As survey result showed that 94% of U.S. wineries have social media portals¹. Based on the increasing use of social media platforms for wineries and the benefits that it can bring to a company, it seems Web 2.0 tools has become more and more important and popularized as a tool for wineries as one important component of their digital marketing strategies.
- 2 According to Gehrke and Turban², home website serves as an important interface which in many cases determines the users' willingness of buying a product or service. There are various ways to promote the home websites and encourage visitors to learn more about the brands such as "create pages for each product or service; include URL on stationary, business cards, brochures; include URL for advertisements" etc.³. As put forward by De Chernatony⁴, brand strategy needs to develop a new mental model to push the in-targeted brand in digital age. Compared to off-line management, on-line brand communication can generate more interaction among the brand communities with a looser degree of control⁵. Being increasingly recognized as a cost-effective marketing tool to communicate brand image with existed and potential consumers, email marketing offers various advantages such as shorter turnaround, high response rate and customizable campaign⁶. Study also shows that for every dollar spent on email marketing, nearly \$46 return can be expected⁷. Tailored information to the interests of consumers on an individual level plays an important role in building customer loyalty⁸. Meanwhile Consumers' perception and beliefs about a brand form the brand image, thus it is important for a brand to have the congruence between the brand image and brand identity⁹. With a consistent image, internet can deliver various benefits to improve the brand vis-

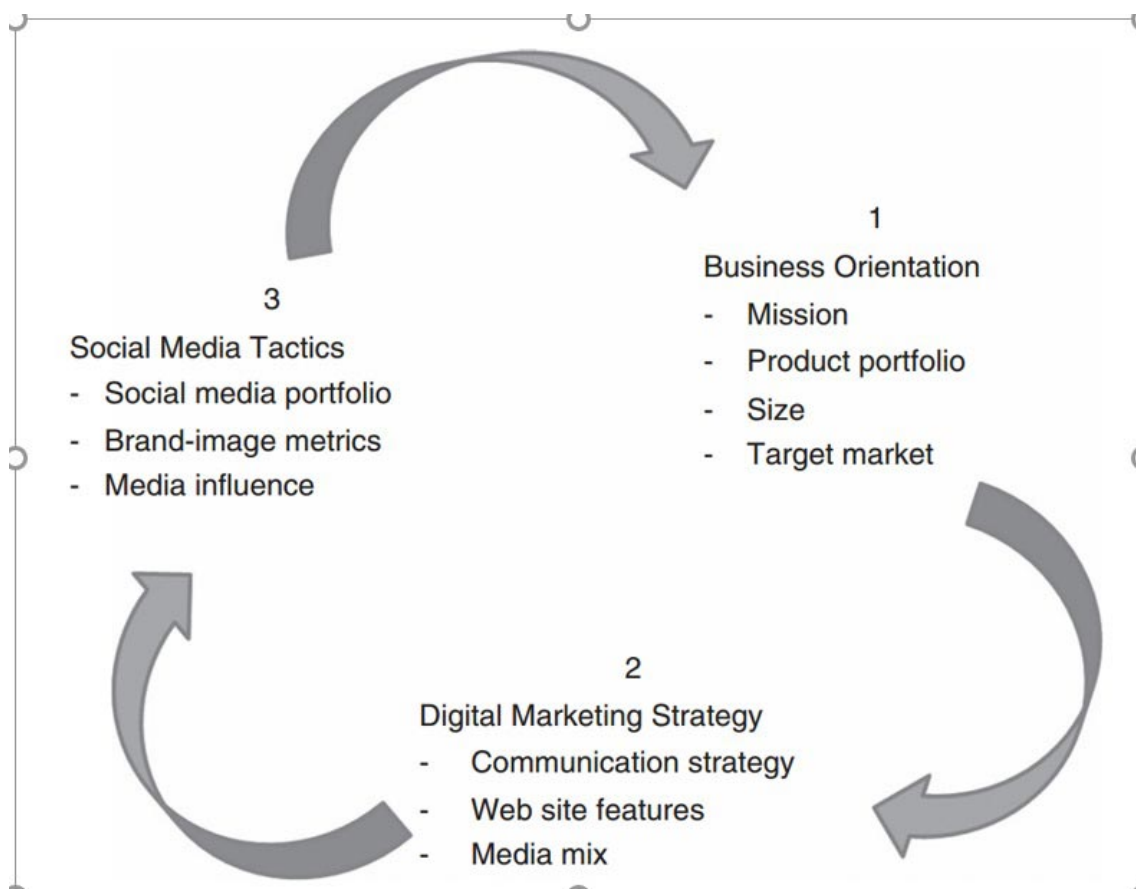
ibility and awareness among consumers. A survey conducted by Nielsen¹⁰ has illustrated that 70% of participants trust the assessments and comments on social media. Social media has positioned itself as a broad information distribution channel. According to Miller's¹¹ research, 75% of people use social media in the U.S. Social media has a strong capacity to reach to the public in terms of information diffusion. Social networks, like Facebook, Twitter, Instagram etc., are gradually replacing some functions of traditional off-line media on brand communication with unlimited marketing promotion opportunities¹². Consumers are the best source of information for a company, social media provides a platform to gather people together and converting consumers into fans, which plays an essential role in brand success. A brand community can collect a group of people who have the same interest in a brand and form a platform to let followers engage in the brand activities, where the company will guide the consumer behavior¹³.

Methodology

- 3 At the first stage, desk research has been chosen to collect secondary data through Internet (i.e. wineries' corporate websites, on-line news) and previous studies so as to know the current situation of digital marketing practices of wineries in the U.S. and the diversified brand profile. In this study, wineries from Napa Valley area have been chosen as samples for case study because of the prestigious status and reputation of wines from this area as well as the availability of online data source. Five American wineries have been chosen purposively at Napa Valley with the consideration of their activity and dynamics online, evaluated by monitoring their web marketing strategies from 14th November 2018 to 14th February, 2019. In order to have a more comprehensive understanding of digital marketing stages of Napa Valley wineries, focus is not just given to the Cult wines which Napa Valley is famous for, but also wineries with different positions and styles. In this research, Stag's Leap, Opus One and Chateau Montelena are the representatives of highly premium cult wineries, while Robert Mondavi are more towards a high quality but valued position. As a pioneer of Californian wine industry, Robert Mondavi engages actively on various events and wine tourism. Castello di Amorosa is a family winery which advocates the more ap-

proachable Italian wine and life style. These three types are expected to provide us the insights of Napa Valley wineries, and understanding of the trends of their digital marketing stage to some extent. Information was obtained from their corporate website, search engine, different social media platforms used by the wineries such as Facebook, twitter and Instagram etc. A web-marketing behavior model proposed by Capitello¹⁴ has been used in this study and the revision and adjustment have been made to its parameters and evaluation criteria so as to better fit for the existing study in consideration the usefulness and appropriateness. The Initiatives has been created to replace the original evaluation criteria creativity in this study. The parameter Email marketing and the evaluation criteria Customization and Updating frequency have been coined and added in this study to evaluate the web marketing practices and strategies of wineries. The details of the model used in this study are shown in the graph below:

Figure 1.



Model proposed by Capitello (2013), URL: <https://doi.org/10.1108/EMJB-10-2013-0046>

- 4 The web marketing analysis was synthesized through an analysis and assessment of target market, website's features, email marketing, social media marketing and based on it to analyze its own brand image and communication strategy. The parameter "Website's feature" was evaluated its website typology and website usefulness by observing and using the corporate websites. The parameter "Email marketing" was evaluated the "Customization" and "Updating frequency" by personally joining wineries email list and analyzing the content of emails and the frequency of email. The parameter "Social media" was described through the criteria "Analysis of social media profile", which was assessed and analyzed their openness towards Web 2.0 interactivity by analyzing its social media profile based on Capitello¹⁵ defined in his paper, including what social media platforms they are using, the updating frequency, and the content of posting. The analysis of the wineries "Brand image" has been conducted by analyzing the "Brand visibility", "Consistency", "Initiative" and "WOM" (Word of mouth). The WOM was investigated by using the website Social Mention (<http://socialmention.com>) to track and measure the content and volume of what people are discussing about their brand across web's social media platforms. The "Sentiment" is the "ratio of mentions that are generally positive of the content across all web social medias to those that are generally negative" (socialmention.com (<http://socialmention.com/>), n.d.). The ratio of sentiment was used in this study as a measure to evaluate the electronic WOM of wineries. "Customization" was considered to be high when the individual information was added and the questions from the consumers were answered. It was low when the wineries only contact the consumers with group sending emails. "Updating frequency" was high when emails were sent at least twice a week. "Visibility" refers to consumers' interpretation towards a brand identity and the translation of it into the perceived brand image¹⁶. The "Visibility" was high when the social media updated at least once a week to share the products and events. The authors also defined the visibility by checking the Google search engine while using the key words "Napa Valley Wine". The visibility was also regarded as high when the winery appeared in the first search page. It was low when the information of the designated winery was missing from the first two pages. The "Consistency", as mentioned in the literature review, refers to the consistency of content display and communication across different online plat-

forms. The “Consistency” was high as long as the winery present similar contents or with common ways of interaction. The “Initiatives” was high when the wineries reached the potential consumers more actively by providing additional information based on their understanding of the consumers. It was low if the limited information was sent based on the request or even no answer was made.

Findings and Conclusion

- 5 With all wineries presenting chateaus, vineyards and products on their home websites to communicate with the users, Opus One and Montelena are the only two wineries which have more than one language available, while the other three wineries only have English version. Opus One's backstage data processing can read the location of web visitors. Chinese website pops out as the authors log on it from Hong Kong. However, for Montelena, there are seven different languages including German, French, Italian, and Japanese etc. Chinese version is excluded with only English version showing while logging on. Concerning website design, all samples in this study provide clear direction to all functions and are easy to navigate. Stag's Leap stresses on its history with timeline showing pictures of important people or symbolic views that present their milestones over 144 years (from 1872 to 2016). Castello di Amorosa focus on their Italian origin and demonstrates that on the photos, videos and stories displaying on the website.
- 6 The five samples have very different ways and styles towards email marketing. Among all the wineries, Robert Mondavi, Stag's Leap and Castello di Amorosa were most active on email responding, with around 2 emails sent each week. But two of them were regarded low on customization as most of the emails were group sending ones on products promotion and discount offer. Robert Mondavi demonstrate the highest level on customization among the group, with 3 emails sent by the Wine Club manager in the first two weeks, offering the special personalized choice for products and club to the recipient. Both Opus One and Chateau Montelena contact the author once by only one email sent in November. The general results of study are shown as below:

Table 1: Assessment results of wineries' web marketingBy comparing the social media.

Parameters	Evaluation criteria	Robert Mondavi	Stag's Leap	Opus One	Montelena	Castello di Amorosa
Target market	Target consumers	Consumers look for quality Cabernet Sauvignon and Pinot Blanc wines which represent the terroir of Napa Valley	Consumers pursue cult wine of classical Bordeaux blends in Napa Valley	High-end consumers who pursue wines combined the Old World and New World winemaking methods	Consumers who are attracted by organic wines with signature grape varieties of Napa	Consumers who pursue the Wine that can best represent the terroir of Napa Valley with the traditional Italian styles
Web site's features	Web site typology	Static website showing pictures of vineyard, top rating wines and winery events, with highlights of special offers	With pictures showing the views of the vineyard; simple design with stories and history highlights	The website can be presented by five languages, including Chinese, French etc.; dynamic website designing to show gorgeous vineyard in the winery; The site navigation at the bottom of the page is not obvious with smaller font size.	Simple website design but clear to know the function of each part; can be showed in seven different languages without Chinese version;	Well-designed with elegant images and letters, the whole design of website is in line with the brand elegant and classic image; linked to several social platforms of the brand at the bottom of the website
	Web site usefulness	Easy to navigate with clear structure and direction	Easy to navigate but not very appealing	Easy to acquire information according to indications showed in the site navigation	succinct and clear to navigate viewers	Well-structured with rich and clear sections and category; information-rich and easy to navigate
Email marketing	Customization	High	Low	Medium	Low	Low
	Updating frequency	High	High	Low	Low	High(around 3 times a week)
Social media	Analysis of social media profile	Facebook: Update almost once every week, with pictures of wines, vineyard and events; reply to the fans comments; a brand community Facebook is also managed beside the brand official Facebook; Instagram: Pictures of people and wine; connects to brand community and interact with fans for promoting winery events; Twitter: Last update on October, 2016; less pictures and events introduction than Facebook and Instagram	Facebook: Update almost three times a week to promote events and festival offers; active interactions with fans and media Instagram: Update as frequently as Facebook; present stories, pictures and videos about the winery activities; reply to fans comments Twitter: Established in 2009 but the last update was in June, 2018, with a frequency around once every one to two months before; simple words without pictures or videos	Facebook: Twice or three times a month to update postings which mainly are about the scenery of winery, sampling grape berries, and seasonal importance to vines and wines(flower, fruit set, veraison); Selectively reply to fans, Instagram: The same posts as that of on Facebook, but these were using more hashtags; Twitter: The posts keep highly consistent on three social media platforms; the last post is on 2 Nov. But there are interactions with fans only took place on Facebook.	Facebook: On average twice a week updating on Facebook with pictures or videos about not only working crew members but also some pressing time. Instagram: The frequency and posts are almost the same as Facebook, but the unique thing is that it will share some adorable pictures captured by visitors; Twitter: The frequency is the same as Facebook and Instagram, but contents have a bit different, for the same post, the winery tends to first release by Twitter, last post is 20 Nov.	Facebook: Subscriber:86,619 On average, it updates twice a week updating on Facebook with photos or videos about 1) their wine, vineyard, scenery, staff, 2)photos and videos for events and gathering with their members for wine related events or events with their fans for celebrating festivals; Replying to fans comments positively, but not always, they usually reply to those comments like asking questions and inquiries. While they always give likes to every fans' comments as a way to interact with their fans. Twitter: Subscriber:13,736 On average, it updating every 2 days. Updating more frequently compared with Facebook, and posting are more focus on up-coming events promotions similar as their email sent to subscribers. The reply rate is much less frequent than Facebook. Pinterest: 859 followers and 7,000 monthly viewers. Subscribers can read the related news or blogs about the Winery on this website. TripAdvisor: Receiving 4,775 comments and getting 4.5 (out of 5) rating from travelers.
Brand image	Brand visibility	Medium	High	High	Medium	Medium
	Consistency	Medium	High	High	High	High
	Interactivity	High	Medium	Medium	Low	Medium
	Initiatives	High	Low	Medium	Low	Medium
	WOM	Very High	High	Medium	High	High
Communication strategy	Communication goals	To exemplify the Napa Valley wines that stand in the world's finest by producing wines reflect the origin and combining newest techniques and time-honored wine-making technologies.	To communicate the values and heritage of the brand to the consumers who pursue the quality fine wine.	Make it a wine transcend generations, and express the essence of time and place, namely representing vintage and terroir which could be captured in the wines' balance.	Advocate the wines to express fruit from which they made and the vintage, so as to produce age-worthy and food-friendly wines.	To convey the worth and heritage of the brand and to express the passion of making a wine as an art piece that can best express the sense of place and authenticity.
	Communication styles	Formal and resourceful on the website and social media; prompt and personalized reply to emails and social media comments	Formal on the website but friendly in social media; standardized email reply but personalized response on Instagram	Formal and standardized without customized recommendations. Passive during conversations.	No response no matter on social media platforms or message box displayed on its official homepage, even its info email	Formal and professional on their home website; Friendly while still professional on social media platforms and email; responsive, positive, polite, helpful and personalized when replying customers inquiry on Facebook and email, but the response rate is much lower on Twitter

7 Performance among the five wineries, Robert Mondavi takes full advantage of online community, shaping the conversation and response to the consumer promptly. Castello di Amorosa also shows the positive reaction with “Likes” to the consumer who leaves a message praising the brand. As for the performance on Instagram, all the wineries post the similar contents as what they put on the Facebook with the same frequency, whereas, they could use more hashtags to raise a topic and appeal to users to join the campaign. Among the wineries, the Chateau Montelena keeps the highest consistency on all of the social media platforms, while other wineries can maintain their brand exposure to the online public within a certain interval. What is worth to mention is that the Castello di Amorosa is the unique one to appear in TripAdvisor among the five wineries, getting a score of 4.5 out of 5 from travelers, which may relate to the strategy of the winery, introducing winemaking history of Italian style and developing wine tourism to the castle-like winery. While searching on “Napa Valley Wine” in Google, Opus One and Stag’s Leap rank the highest

among the group, showing both on the first search page. This may be caused by their highly premium market positioning and renowned reputation among the wine world. A study showed that this rule applies in different industries, for instance, more well-known and famous universities ranked higher on the search engine, as suggested by Vaughan and Romero-Frías¹⁷. These two wineries were both considered to be high on visibility. With regards to WOM, most of the wineries have achieved the pleasant results on the ratio of sentiment of Social Mention, all wineries' ratio of positive content to that of negative are distributed quite similar except for Robert Mondavi and Opus One, the former achieved a quite remarkable results in terms of WOM (23:0), while the later achieved relative low results when compared with the results of other wineries. The results that retrieved from Social Mention were recorded as the table below:

Table 2 : SocialMention results on WOM

Winery	Ratio of Sentiment on Social Mention
Robert Mondavi	23:0
Stag's Leap	11:0
Opus One	3:1
Montelena	17:1
Castello di Amorosa	11:0

8 According to the results that attained from the interaction and observation with five wineries online and the information retrieved from its corporate websites, the major findings of the analysis can be summarized as follows:

1. The wineries' digital marketing strategies are mainly shown on its corporate website, the communication strategy adopted by wineries is not always consistent with the content they have posted on its different social media platforms, and sometimes the daily postings do not contribute to the realization of communication strategies as the contents are standardized;
2. For the content and method that wineries chose to communicate and interact with their consumers, not many wineries customize their email and provide personalized reply to their customers on social media platforms, in-

- stead, the contents usually seemed like mass email without special attention paid to different preferences of market segmentation and customer profile;
3. The brand visibility is not consistent among different social media platforms. The original amount of social media platforms that adopted by wineries were three on average, the number of adopted social media platforms were gradually decreased with the time went by. Facebook serves as the main and the most frequently used platforms, followed by Twitter as a complementary platform to communicate and interact with their audience. Instagram is the least used social media by the five wineries now. Some of them has retreated from the platform, which is in line with the survey results (Comscore, 2016).
- 9 To conclude, the positive brand image and high visibility begin from choosing and implementing a right communication strategy, and using the most appropriate social media platforms to approach their consumers with high updating frequency as well as friendly and initiative communication styles. Followed by it, it is vital to ensure that the wineries need to be always highly responsive to consumers' inquiries by replying comments and emails online positively. Besides, the contents that posted on social media platform should achieve: 1) the brand's own communication strategy and communication goal; 2) creating discussion among their target audience so that can strengthen the wineries brand image and can create electronic WOM. The contents of email for their consumers should be personalized in consideration of consumer preferences and their different profile. The website needs to be designed with user-friendly features and easy to navigate and rich in useful information for wine consumers.

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English

In order to understand the effect of digital marketing on brand visibility of wineries in the age of internet 2.0, the researchers conducted a qualitative research to five Napa Valley wineries. Based on the primary and secondary data collected through the communication between the researchers and the wineries via email, home website, and different platforms of social media, a behavioral model proposed by Capitello (2013) was introduced to examine the effectiveness of digital marketing towards brand visibility. Some of the parameters and dimensions in the model were adjusted to fit

the appropriateness of the study. As a result, communication style impacts significantly on consumer's first impression to the company, and the wineries need to allocate the resources wisely. The researchers also proposed a further study about the relationship between the brand recognition and online marketing efforts under a sufficient period and similar brand positioning so as to have a fuller picture about the topic.

Français

Afin de comprendre l'effet du marketing numérique sur la visibilité des marques des établissements vinicoles à l'ère de l'internet 2.0, les chercheurs ont mené une recherche qualitative auprès de cinq établissements de la Napa Valley. Sur les bases de données primaires et secondaires recueillies lors de communications entre les chercheurs et les établissements vinicoles, par courriels, sur le site Web de l'établissement et sur différentes plateformes de médias sociaux, un modèle comportemental proposé par Capitello (2013) a été introduit pour examiner l'efficacité du marketing numérique sur la visibilité de des marques impliquées. Certains des paramètres et certaines dimensions du modèle ont été ajustés pour correspondre à la pertinence de l'étude. Il en résulte que le style de communication a un impact significatif sur la première impression du consommateur à l'égard de l'entreprise, et que les établissements vinicoles doivent allouer leurs ressources de manière judicieuse. Les chercheurs ont également proposé une étude plus approfondie sur la relation entre la reconnaissance de la marque et les efforts de marketing en ligne sur une période suffisante et un positionnement de marque similaire, afin d'obtenir une image plus complète du sujet.

Mots-clés

marketing digital, marketing par courriels, médias sociaux, visibilité des marques, contexte de bouche à oreille

Keywords

digital marketing, email marketing, social media, brand visibility, word of mouth background

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