

Institut Supérieur du Vin



MBA1 Wine & Spirits International Management

The emerging of new branding strategies in the wine and spirits industry

*In what way do the changing needs of consumers challenge the wine
industry?*

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Abstract

During several business meetings I attended and business travels I did over the past few months to visit accounts and distributors all over Europe and the United States, I have noticed that Souleil had a very strong impact as a brand. People often said the wines « ticked all the boxes ».

I wanted to explore that phenomenon and dive deeper into that subject. After noticing in the field that people were paying more and more attention to the labels of the wine, the storytelling, the substance and the coherence of the story around the brand and not just the quality of the juice, I wanted to make a research subject out of this observation. I think it is crucial to the future of the wine and spirits industry.

I chose to work on the evolving expectations of the consumers as it is today the most important factor winemakers and brands have to consider. The evolution of the consumer's needs is what I was able to notice and experience during my professional experience. To that, I also wanted to add a specific angle: the opposition between the "New world" and the "Old world" in the wine industry because it is what made the most sense. Indeed, being both French and American and having had the chance to work both in the United States and in Europe most of my apprenticeship with Souleil this subject seemed to undeniably make sense.

Moreover, being able to work both in the United States and in France in the wine industry, I have noticed a major issue: the fear of the brand. Indeed, the word "brand" is a problem in the French and European wine world, and it's something that surprised me as a Franco-American. I had the impression that for some wine professionals, often very traditional, branded wines were necessarily low-end wines made by people who didn't take care of the vines. I found the truth to be quite different. I wanted to understand why the word "brand" unleashed such discomfort, contempt, or even uproar. I was all the more surprised as it is brands that today have ceased the importance of adapting to the consumer. Brands are making change happen by offering a storytelling and brand universes that are much more daring and less rhetorical than some of the players who have been making wine since the dawn of time.

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Introduction

The wine and spirits industry is in the midst of a pivotal moment. It is undergoing a major transformation due to the combined effect of new consumers (millennials and other young individuals who are sometimes wine lovers or connoisseurs and often hipsters), new offerings (new world wines, natural wines) and new consumption patterns. Driven by a desire for authenticity and discovery, this new generation of wine lovers does not reject the traditions of the old but expects to be offered new experiences, such as a discovery, a cause to defend, a special moment, a social interaction. People want to drink their beverage while feeling they have a purpose.

Producers all over the world are trying to surf on these promising new trends but they are still difficult to grasp. In their great majority, they do not have the necessary introspection. They prefer to remain in their old practices - practices that they are familiar with. The problem is, these practices do not resonate with the newcomers to the market. An understanding of fashions and trends is necessary if one wants to avoid offering something superficially built.

Also, the time has passed for selling with the cryptic jargon of wine lovers. Vocabulary such as "blackberry berries", "old saddle leather" and "forest floor" is maybe a tinge too academic and exclusive and a reflect of the standardization of the wine tasting technique. How one describes a wine relies essentially on their referential and the smells and taste they are accustomed too, thus it can vary from one person to another.

As I am learning to be a Project Manager and a Brand Ambassador during my apprenticeship, I am proud it is for the Souleil brand - a recently founded and an up to date brand that not only listens to consumers' priorities and offers products that are fun but more generally that has understood the changing world along with its opportunities and challenges. Innovation and creativity is key when the consumer is asking for renewal. One has to adapt to keep up the pace and as a result a lot of questions gravitate around these notions that are sometimes hard to grasp.

Theme : The emerging of new branding strategies in the wine industry

Question: In what way do the changing needs of consumers challenge the wine industry?

First, we will see what are these new demands and consuming habits manifested by customers. We will then study how they affect branding strategies and how these new strategies differ from one country to another. Finally, we will compare and contrast the effectiveness of some of these strategies that transcend country borders and give recommendations and guidelines based on this research project.

I. A changing consumer: new needs, new demands and behaviors

In this segment we will take a look at the current situation of the consumers' behavior towards wine consumption in France and in the United States.

As Julien Moreno said: « People are drinking less and less wine ». The General Manager at Benoit NYC, a restaurant owned by the famous Monegasque starred chef Alain Ducasse, started his masterclass featuring wines of the Languedoc at la FIAF (French Institute - Alliance Francaise) by summarizing the most significant change today in the French consumer.

Juliette Bory, founder of George, a consulting agency specialized in marketing and communication for winemakers and brands, also makes the same assessment: In the aftermath of WineParis, there is one figure that is on everyone's lips. Since the year 2000, the volume of wine consumed in France has dropped by 69% per year and per inhabitant. This is a considerable drop.

The Wine Market Council also shows that too many consumers under age 50 drink alcohol but not wine. Too many are buying for special occasions but not for everyday use. The consumer population for wine still skews to those over 60, and that is a segment that is growing. For many consumers, the data shows that wine is their parents' alcoholic beverage but not their own. If this preference continues for too many more years, it will only increase the number of non-consumers of wine, as the Wine Market Council data is already showing. This decrease in wine drinking is the result of the cumulation of many new habits.

We talk about the “deconsumerism” of wine in volume, when in fact, there is a real opportunity for winemakers. The George agency, specialized in communication and marketing strategies, shows an increase of 5.2 points in the number of wine consumers since 2010. So yes, it is true that the French are drinking less wine in recent decades in terms of volume and seem to prefer beer. But, wine is gaining new consumers every year. More and more French people are consuming wine. And this is an opportunity: the opportunity to seduce these new consumers.

The beverage alcohol industry is in a state of vast disruption, and wine is no exception. Forces at play come from many angles, including changing consumer preferences. Here are a few ways that we tried to classify into categories that can testify to disruption in the wine industry today.

1) The need for sustainability and traceability: an emerging pattern

The consumer behavior patterns have changed along with lifestyle, food integrity, ethical and ecological sustainability factors, and digital communication. These forces have led to a demand for quality and customization.

a) Health driven purchases

Wine consumption has dropped considerably in France since the 1960s because we have changed our consumption model. Wine was originally a product of everyday consumption. A product that is consumed daily in quantities equal to or greater than water. Wine was drunk with every meal, it became almost indispensable on a table. Today, this is no longer the case because the consumer typology has changed. This simply means that wine consumption is much more exceptional now because it is consumed in smaller quantities, less frequently, for special events, during moments of sharing, such as a family dinner.

According to the SVB State of the Wine Industry Report of 2023, as consumers, boomers are being replaced by younger buyers (10,000 per day). Each of those replacements possessing different tastes, values and desires than the older generation. The main characteristic that distinguishes boomers from other consumers is their affinity for wine. Those younger than 60 are less in love with wine than those older than 60. That means that consumers that used to love wine are being replaced by consumers who are more committed to reducing their consumption for health reasons for example. This large dataset shows that consumers younger than 60 are less interested in buying wine today than they were in 2007. This is telling us that whatever wine brands and winemakers have collectively tried to do to engage with the younger consumer in the last decade hasn't been good enough. France is more and more going towards "wine in moderation". The consumption of wine is declining mainly because of health reasons. The consumption can be described as much more "conscious" and reasonable.

Indeed, the latest article published on Meininger's International of consumers habits testifies to this. The movement is still in its early phase but Dry January is building a growing awareness. The campaign was launched in France in 2019 and the 2023 edition of Janvier Sobre gained 100,000 information from the website over a year.

A good example of health driven concerns is the hard seltzers (cf appendix 1). They wear a clear message of "no added sugars" and few ingredients, have excelled with health-minded consumers. Unlike wine, seltzers are required by the Food and Drug Administration to add a nutritional label to their packaging. Although this is changing with the new law passed in Europe that requires to add the nutritional index as well as composition on wine bottles. Even if the wine industry has resisted these requirements for a long time, the law passed by the French government might turn things around. The obligation to have the list of ingredients and nutritional information on back labels is now a way to be more transparent.

Moreover, interest in abstinence is growing. This makes up for a big part of the trend for dealcoholized and lower-alcohol wine (cf appendix 2). According to the article, 29% of French consumers now drink these products. The consumers that are concerned by this are more likely to be from the youngest age group. Indeed, alcohol-free 'wine' is considered to be more relevant by 18-25 year-olds. Their interest in this trend includes a desire to reduce alcohol consumption and pay greater attention to health.

Alcohol has always been at the center of social celebrations. But low- and no-alcohol options are on the rise across all categories (cf appendix 3). Motivations for choosing an alcohol-free option are varied, but there's no question the trend is picking up steam. Even Paris, "the capital of quintessentially vin-focused France", has an entire store dedicated to low- and no-alcohol options. Consumers should note that while non-alcoholic beer, wine and spirits can be perceived as more health-conscious, it is not always true. They definitely allow drinkers to join the fun without a unwanted hangover the next day, but they aren't necessarily low-calorie or low-carb.

b) Social responsibility

Second, social responsibility is important to millennial consumers. This is a factor embedded in their purchase decisions. They are focused on triggering change and insist that companies consider how they impact both the earth and society as a whole. Younger consumers are effectively using activism and social pressure to initiate change and are reframing social expectations (cf appendix 0).

Eric Asimov, The New York Times' wine critic, also points out a crucial change that challenges marketing strategies in the wine industry today. Marketing to younger consumers ought to amplify sustainability and social responsibility. It stems from the belief that these are subjects that wine is well-positioned to highlight. Health awareness is an area where wine has already showed some success, with the so-called "clean wines". These clean wines can do various things for the environment and health. They can either give a part of their benefits to a foundation that is environment friendly, be sugar free or be nutritionally acceptable. "We lack the transparency our consumers are demanding when we refuse to even put calories on the label, and that is a huge marketing miss," Eric Asimov said.

Eric Asimov cites Mr. McMillan in his article. He asserts that young people are skeptical about inauthentic and opaque marketing. "I haven't seen evidence suggesting this is truer of younger generations than anybody else, but visiting a wine bar in a bigger city offers some support. The patrons are often young, and they are drinking wine. Often, it's natural wine, mostly imported brands, not "clean wines," which are often examples of opaque marketing."

The survey by SoWine mentioned earlier, also reveals that many shoppers are interested in organic wine. Today, two-thirds (nearly 67%) of consumers take the time to look to see if the bottle of wine they want displays the AB logo, a figure that has increased considerably since 2019. This interest is clearly confirmed among young people under 25 and connoisseurs. To sum it all up, their motivations are based on respect for the environment (49%), wine quality (44%) and health (37%). The study also shows that buyers are willing to pay more if the wine is certified organic, even if

some are afraid of finding a taste too different from what they usually like. This portion represents 20% of those consulted. The factors creating this circumstance will not evolve in the industry's favor unless the wine industry decides to take on the challenge. Thus, an environmental commitment today is key. According to the newest edition of "State of the U.S. Wine Industry," which has made recommendations for more than 20 years, the industry ought to emphasize the environmental sustainability of wine, and should embrace transparent nutrition and ingredient labeling, which the industry has resisted for years, to attract those concerned about health and wellness.

Let's take the example of the brand Souleil. We can very well say that this brand ticks all the boxes. Not only does it give a full experience product with a designed and original label, but it also gives a substantial and thorough storytelling around the brand, and most importantly, it is a brand with a purpose. Indeed, Souleil supports a cause: protecting one of our most valuable resources, the oceans. It does so by giving part of its proceeds to a non-profit based in Costa Rica which organizes beach cleanups and educational classes to raise awareness on sustainability. Aside from giving part of its benefits to the 5 minute foundation, it also is the sponsor of many beach cleanups organized all around the world by non-profits. In sum, it is a brand that is recognizable, sustainable and charitable. A brand with purpose is what people are looking for and not just "a qualitative juice".

2) Wine-savvy consumers

What is newsworthy is that today younger consumers may be wine-curious and that is something to exploit and be aware of while implementing new branding strategies. At least young consumers appear interested in wine.

In terms of wine knowledge, the French have made progress since 2010 as shown in the SoWine 2022 Barometer conducted in December 2021. Indeed, the share of connoisseurs has increased by 3 points and the portion of enlightened amateurs has increased by 12 points whereas neophytes have decreased dramatically (minus 12 points). Indeed it went from 64% in 2010 to 49% in 2022 (cf appendix 4).

a. A rising interest

According to Elisabetta Virtuani in her research for the University of Pavia (Italy), 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. Multidimensional in the sense that, 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 is an important concept here. Hedonic attributes are defined as the attributes which deal with the experiences of sensory appeals, which include emotion and gratification (Batra & Ahtola, 1991). The motivation behind hedonic attributes deals with the entertainment-seeking behaviors of consumer. Thus, the hedonic aspects of a product contribute to the consumer creation of value and are referred to health, social and environment related dimensions. We are moving from the "simple 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 value created by the product system can be recognized by the consumer who will be willing to pay a higher price to have it. The product differentiation, in other words its uniqueness, can be increased by working on the quality features that satisfy the tangible and intangible consumer expectations. When these are communicated to the consumer and perceived by the consumer, this make him willing to pay a premium price (cf appendix 5).

The marketing literature has traditionally highlighted that the quality of goods can be evaluated on the base of three different dimensions:

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.

It becomes therefore very important for the consumers to have access to the information about a product's composition and processing in order to evaluate their quality. Nowadays, two points are decisive for consumers. On the one hand, the origin of the wine, by looking for the region or country of production (45%) and the price factor (41%). The notion of grape variety becomes essential in the purchasing process of the French, cited by 25% of them and ahead of the appellation, sought by 22% of those questioned.

The SoWine barometer observes that wine consumers, adepts of the daily glass of wine, are more and more connoisseurs and curious. Indeed, whether young or old, more than three out of five French people (62%) are interested in the world of wine. This indicator is up 12 points compared to 2019. Nearly one in two declares himself an enlightened wine lover. In addition to drinking at home, the survey shows they want to know everything about what they have in their glass and where the wine comes from.

Today, the wine industry has also to deal with millennials. This generation has not shown the same interest in wine as boomers, the prime consumers of wine. We are refering here to the fact that less and less young people are actually buying wine. New data from Sovos ShipCompliant, helps to showcase that phenomenon. This company helps wine producers deal with the legal aspect of shipping wine all over the US. Their data allowed them to paint a clear picture for 2023: consumers younger than 60 years old are even less interested in buying wine today than they were in 2007. The problem doesn't not seem to affect the premium wines category. Indeed, the sales of bottles costing more than \$15, roughly what the industry refers to as "premium wines," did quite well, with "excellent growth and returns." The biggest current problem is with wines under \$15. This category lacks identity and differentiation and clearly needs a renewal.

b. The emergence of wine tourism

The development of wine tourism testifies to these numbers mentioned above. There is a real evolution in the customer's relationship to wine. A particular interest is developing towards the "winescape" and the cultural landscape of the wine. The relationship between people and the land has always been a very close one particularly in viticulture but today wineries and producers are capitalizing on that. Nature, culture, events, wine-tasting become a way for the visitor and/or consumer to look for experiences more than products, for human and cultural relations more than consumption. As a result, consumers are more attracted to wine-related events such as open houses at a wine producer's, tastings with oenologists, wine shows or fairs, as well as discovering the vineyards through wine tourism, which is today a booming sector. Another strong trend: the criteria for choice are changing in the act of buying.

Gérard Bertrand has understood that perfectly. He has understood the potential of the region of the Languedoc, not just as a fruitful and creative production site for wine but also as an attractive region in itself. He clearly sees the appeal of this wine region and its originality which must be recognized and branded. He is constantly deploying a communication strategy in order to "re-enchant" commodities and to differentiate them from the devalued functionality and homogeneity of "standardized products and places". A perfect example of that is the jazz festival and the numerous dinners that are organized in each of his estates across the Languedoc all the way to the South-West wine region. Leveraging on the winescape allows 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. It can be a powerful instrument for building brand awareness and differentiation. By doing so, the wine brand then also becomes a "territorial brand" that the consumer remembers.

3) The customer: the center of branding policies

a. Lifestyle changes

If we look at wine consumption in France, the sentence that comes to mind is "wine on the decline". That is exactly what the article published on March 27 in Meininger's International shows. The consumers are at the center of everything now, so the industry has to pay attention to their habits and demands. By placing the customer at the center of the decision making process the industry is able to face the changes mentioned earlier.

The article focuses on French wine and the habits of French consumers. What it has to say is extremely relevant for the rest of this analysis and for the new branding policies that will have to adapt and react to these new patterns. The three main points to point out are the following:

-wine consumption in France continues to drop

-red wine is left aside more than other styles

-French consumers are showing increasing interest for no- and lower-alcohol (NOLO) products.

According to the article: “15% of French adults say they never drink alcohol, with almost a quarter of 18-25 year-olds declaring themselves teetotal (source: Sowine/Dynata Baromètre 2023). Also, “the decline of wine drinking in France is slow but steady: from 32 million hectolitres in 2007, consumption had fallen to approximately 24.7 million hectolitres by 2020.” Finally, “red wine in particular has fallen from favor, with consumption decreasing by almost a third over a ten-year period (2011-2021).”

These numbers testify to the fact that that demographic and lifestyle changes are directly affecting how people consume wine. Thus a direct link must be established between the consumers’ needs and how brands make up their strategies in order to adapt to this new environment. Concerning the demise of red wine for example, La Revue du Vin de France suggests that "this style is typically associated with formal dining occasions and red meat”. These eating habits have fallen out of fashion and that is another aspect wine brands must take into account.

b. The customer is the key

It is no secret that today the customer must be at the center of a brand’s preoccupation when building marketing and communication strategies. The customer has become the most important part of the puzzle while constructing a company’s branding strategies. According to the Harvard’s Business Review, most managers today agree with the notion that they should focus on growing the lifetime value of their customer relationships. Building loyalty and retention, cross selling related goods and services, broadening offerings to fulfill more of customers’ needs. The wine business makes no exception.

Juliette Bory puts the emphasis on putting the consumer at the center during my interview of her. In her work, she explains that she only does custom-made. Which means the solution depends solely on the target audience that the producer wants to speak to and sell to. What is to be understood here is that there are plenty of opportunities for development in the wine industry, provided that we think about an effective strategy, and above all, focus on the consumer. Putting the consumer at the center of our strategy is essential today. But the main difficulty we face in the industry is that it is still difficult to make the decision to reduce the audience we are trying to appeal to. Producers understand this, but it's still counterintuitive.

Another very important point is that consumers do not make any compromise when it comes to drinking wine. Each consumer likes what he likes and will not necessarily be flexible. That is why a brand or a producer can't compromise when building their brand strategy. They absolutely have to rely on the individuality of their brand and their wines. In a nutshell, you can't please everyone, otherwise you please everyone and no one at the same time and the strategy of putting a precise and detailed profile of a consumer at the center is ineffective. This also means that producers don’t need to fight for market share. The important thing is to focus on the viable (and smaller) audience that will be interested in their wines for very specific reasons - the reason that makes a producer or a brand inherently unique. These are the people who will be the ambassadors of the wines and of the brand.

Bistriti Poddar, a Chief Communications Officer and a content specialist who works with organizations that need help in innovation and strategy, explains in one of her articles that in the age of empowered customers, companies need to go the extra mile to find out what customers really want in order to earn their loyalty and establish a lasting relationship. Indeed, client-centric companies are 60% more profitable. Customers expect brands to offer relevant perks to them and respond to their unique needs through personalization and effective loyalty programs. If that is the case, then the customer will bring referrals, which results in more leads and more sales.

The benefits that come from being a customer-centric brand are crucial in the wine business today. A satisfied consumer experience can lead to positive online reviews which will add external value to the brand. Saying your brand is the best is one thing, but coming from a consumer's point of view is a whole other level of credibility and legitimacy. That is why personalized experiences lead to a sustained loyalty and valuable consumers. Finally, being customer-centric will give the brand a unique competitive advantage. As we saw in this globalized world, that is a crucial string to have to ones bow.

c. Deconsumerism: a real opportunity

There is a real opportunity even though people are consuming less and less wine. When the consumer buys wine, it is no longer a rational purchase but an emotional or even identity-based purchase. When we make an emotional purchase, we don't just look at the price, because we are buying something else, we are buying more than just a good quality-price ratio. If brands and winemakers want to be effective, they have to be interested in how to arouse these emotions in potential buyers and what they feel, what they need to feel, what are their fears, their needs, etc.

Deconsumerism is an opportunity for all producers, an opportunity to do things differently. Brands must not do as well or compete with their neighbor, they must choose their own positioning. There is room for all operators in the market as long as they focus on a particular segment and on the consumption patterns of that specific segment. Juliette Bory's interview adds something important to this part of the analysis: she explains that segmenting the market further and reducing the number of people a brand includes in their target audience is currently much more applied in the "New World" such as the US. They have understood that there are not only different categories of consumers that are inherent to them but that there is also another way to segment. To determine these segments it is no longer just a question of making a division according to technical characteristics, age, geographical sector, socio-professional category. All players in the wine sector need to segment consumers according to their commitment, what they believe in, their consumption mode and their lifestyle. The new way of segmenting must be done by consumption typology, in other words, the moment of the day when a consumer will consume his wine. Indeed, the same consumer can consume different wines at different times of the day. For example, there are wines that are purely "branded" for a specific moment. Whether it is a barbecue wine or a wine for a night out with a date.

Also, if we look at the start of the chain of production, 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 customer 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. Thus, we can say that there is an undeniable “cause and effect” between a consumer’s habits and the success of a brand if it is capable of listening to these new demands.

In all cases, the product must be obvious to the consumer at the moment he needs it. And that is the crucial part of putting the consumer at the center of the company’s strategy. So, focusing on the consumer is key. The new consumer has less brand loyalty than previous generations of customers. 71% of the baby boomer generation used their previous experiences with a wine label when making a new purchase. This statistic is drastically down with millennials, who only use past experiences to influence their next purchase 43% of the time, according to a Nielsen report. That same study showed 52% of baby boomers knew which brand of wine they intended to purchase in advance, whereas only 24% of millennials knew before walking into the store. The new consumer continues to purchase a brand because of quality taste and if the brand matches his values. Consumers are also looking for easy access to their wine. Indeed, local and higher-end convenience store sales increased at twice the rate of other outlets.

This makes us slide into the second chapter of this essay: new branding strategies as a response to consumer habits. A first observation has been made upon the difference that may exist between the old world and the new world. We will keep that in mind for the third chapter. We will see in this second chapter how emerging branding strategies are crucial to the evolution and innovation of the wine industry with some examples in the spirits industry. As a whole, the key common thread is that wine consumer behavior has changed in multiple dimensions – be it what they drink, how they drink, and how they buy. So how are some brands speaking to these values and tackling these new behaviors and very precise demands?

II. New branding strategies as a global response

Globalization is often a synonym for competition. Meaning that 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 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 brands need to find new strategies to preserve their individuality and uniqueness to face the new global competitive challenges. They do so by looking for new strategies with an emphasis on marketing and particularly on branding.

On the demand-side, globalization has had two opposite effects: on one hand the homogenization 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 redesccovery of local identities and a stronger attention to specificity and typicality where the territory plays an important role.

It all comes down to one thing: now that consumers have more options, wine labels need to do more to stand out and win that coveted brand loyalty. In this second part of the essay, we will see how brands have managed to implement new branding strategies and the ones that are effective and really stand out.

1) Attracting young consumers

Before going into the analysis, it is important to describe who the young consumers are and how they are categorized. Generation Z is generally defined as those born between 1997 and 2012, while millennials are defined as those born between 1981 and 1996. But Generation Z and millennials are generally on the same page when it comes to social and political issues. Digital natives are accustomed to receiving information on multiple platforms. They are aware of the world around them, they value diversity and they especially turn to social media to shop and for entertainment purposes.

“In branding veritas” (source: Longrine - Stratégie et design de marque) - an expression I have come across several times during my research which perfectly fits with our analysis. *Veritas* is the name given to the Roman virtue of truthfulness, which was considered one of the main virtues any good Roman should possess. This Latin word *veritas* now appears in the mottos of many colleges, universities and other diverse organizations. It is typically capitalized in mottoes for being an ideal. This expression literally means “In branding, there is truth”. It is a pun and a derived expression from the original one: *In vino veritas*, "In wine, there is truth", suggesting a person under the influence of alcohol is more likely to speak their hidden thoughts and desires. This is a fun way to emphasize on how branding is important and legitimate today and not just an ornament. Furthermore, this also means that new branding strategies have to be coherent with what the consumers want and most of the time, if a trend emerges, it obviously is a response to what the consumer demands.

The consumer wants the wine they purchase to match their values and lifestyle, and it's forcing some brands to rethink their strategy. Millennials, people who were born between the 1980s and the turn of the century, are the perfect target for brands. They prefer experimentation and care about how the label looks, but they also want quality. They don't focus on brand loyalty as much as the feeling they get while purchasing wine. The younger generations are also exploring alcoholic beverages beyond wine, and finding ciders, beer, and mixed drinks, as well, leaving the wine market needing to adapt. The different approaches and strategies used by the wine industry could be grouped in those related to: the product itself (inherent characteristics such as flavor, appearance, etc.), marketing (packaging, branding, etc.), and wine tourism strategies (cultural heritage, tradition, production system, etc.)

Attracting younger customers, who are more diverse than older generations, requires reimagining and redefining the audience and the individual brands. Each point of a brand's expression, the website, tasting room, winemaking, growing operations, company goals, packaging, hiring practices and even the dress code, has to be evaluated for how well it will resonate with a new audience. The solution to flagging demands is to improve the value of wine for the consumer in the face of competing beverages. Reducing prices could increase value, but a better bet is to promote features about the wine that resonate with new and marginal wine consumers. With that information, we should start with an industry advertising campaign to boost the category, measuring success along the way. What the American wine industry is currently spending on advertising is embarrassingly low. It goes up to 5% of a company's budget for the alcohol beverage advertising spending. "And that 5% is the spending in a good year! It's more often less than that"(State of the US Wine Industry 2023).

Another aspect to keep in mind is that the wine category isn't playing in the same league as beer, spirits when it comes to creating interest in the products. Wine was cool and trendy with young consumers 30 years ago. The category back then spoke of boomer values, conspicuous consumption, outward personal success which are no longer the core values of young consumers today, at least not in priority. The study explains well that the younger generation is skeptical about inauthentic and opaque marketing, and most of the time they don't care about the family's name on the bottle unless it comes with a story that resonates with them. Younger consumers are more interested in what's in the bottle, where it comes from, how it's grown, the ingredients and additives, how it can make their lives more fulfilling and how the brand, as an organization, tries to make the world a better place.

The key to future success in marketing to younger consumers is recognizing the things that are important to them as opposed to what has worked in the past, then leveraging those values in marketing wine. It is a tricky dance to produce a consumer product, but also being true to a tradition that has spanned 8,000 years. Brands can stick to traditions and traditional labels, but they have to evolve and, as marketers have done for generations with other consumer goods, find the points of agreement where changing generations have common ground. This is about reflecting the values of younger consumers in branding and messaging.

a. Appealing to aspirational curiosity

In an article written for the Wine Industry Advisor, Kathleen Willcox cleverly demonstrates 11 strategies to successfully attract young consumers to wine. Kathleen Willcox writes about wine, food and culture. She is keen on sustainability issues, and the business of making ethical drinks and food. Her work appears regularly in *Wine Searcher*, *Wine Enthusiast*, *Liquor.com* and many other publications. The first strategy she mentions is “Appealing to Aspirational Curiosity”. This strategy is very important because as mentioned in chapter 1, young consumers are more and more wine-savvy and search for education around wine. “Millennials and Generation Z are curious about wine,” says CEO Joe Fisch, who explains that it is often a matter of providing the right opportunities for entry. “They’re more likely to join our wine clubs and buy wine sets. They also actually spend more per bottle than baby boomers and Generation X,” he says. This clearly means that younger consumers prioritize knowledge building and experience. That is the angle to look from and constantly keep in mind when building a brand or communicating about one’s wine and estate. Kathleen explains that attracting a more diverse and younger cohort of repeat customers doesn’t require, as some may think, “a drastic rethinking or dumbing down of wine culture.” But it does require imagination, an open mind and a willingness to color outside the lines. She refers to these successful brands as “unicorn brands that consumers in the ultra-desirable 21 to 35 age bracket flock to”.

b. Highlighting sustainability

As the reality of climate change becomes increasingly apparent in everyone’s day-to-day lives, consumers are increasingly interested in supporting environmentally responsible producers. (cf appendix 6)

A good example of that is the Gérard Bertrand group. The brand has become increasingly committed to tackling environmental issues and places itself as the guardian of the Languedoc by focusing on organic and biodynamic farming in the vineyard. One of the group’s estates, Château de Celeyran, is currently in the process of developing a large-scale biodynamic vegetable farm, with 150 varieties of vegetables and fruit grown onsite. Chateau l’Hospitalet, also one of the estates in the Languedoc has a gastronomic restaurant that sources as much as they can from the winery’s gardens and free-range sheep, cows and poultry onsite. This system was specifically designed to limit the carbon footprint at its maximum. As a result, the events and communication team is eager to demonstrate the promise and bounty of their efforts to younger consumers looking for something beyond a typical tasting experience.

The Gérard Bertrand group also recently launched astral wine-pairing dinners at L’Art de Vivre, the fine-dining restaurant at the winery’s eco-wine resort in Narbonne. “Chef Laurent Chabert and head sommelier Pierre-Alexis Mengual are aiming for the experience to be multi-sensory and transcendental,” says Véronique Braun, director of communications for the Gérard Bertrand Group. The concept is to allow guests to discover how each planet of the solar system influences the natural world which is a fundamental principle in biodynamics. The serving of the food will be done according to the cyclical rhythm of the stars. Meaning that each dish, along with its wine pairing, will be matched to a corresponding energy, in harmony with its flavors, colors and textures. This

spiritual experience of food and wine pairing unfolding with the rhythm of the cosmos is a true example of creative thinking. It not only offers a unique experience but it also answers the consumers' need to be closer to nature and find purpose in their wine consumption.

c. Celebrity and cultural collaborations

Wine brands and winemakers must be aware that Pop culture gives that sizzle and modern flare to different brands. It is also the entry door to meeting Gen Z and Millennials. Indeed, consumers may feel they have a direct relationship with these well-known celebrities. That is because they endorse different products and their influence tends to be greater on millennials who follow that celebrity via social media, according to a study by the Journal of Retailing and Consumer Services. The study shows millennials are more likely to purchase an item from an influencer if it matches their personal lifestyle. Stars are faces that, we as consumers, are familiar with. That's why when companies have a big enough budget to bring on an A-lister, they might attract more young consumers.

A fitting example of this is the collaboration between Chateau La Mascaronne and Tony Parker. The basketball MVP Tony Parker and Michel Reybier became associates and launched their own brand of Champagne called Jeeper. Now that Parker is retired from the NBA, the world of wine is very much where his focus lies. It's his absolute passion going back to his Spurs days when he and Coach Gregg Popovich, a fellow member of the Hall of Fame Class of 2023, would frequently host wine dinners at his estate in San Antonio.

By partnering with Michel Reybier, both have targeted the increasingly exciting intersection between wine and hip hop, sponsoring the Wine & Hip Hop Festival and pushing Parker to the forefront of the brand as ambassador. "When Tony and I joined forces on Château La Mascaronne, it was very much inspired by our common passion for wine and the industry, but more than that, by our common interest in sharing wine — and all the pleasures that accompany it — with a wider audience," Reybier says. Thus Tony Parker, a millennial himself, uses his hybrid background, as an American and a Frenchman, and equally as an NBA legend and a wine enthusiast, to connect with new and younger audiences. By collaborating with Wine & Hip Hop Festival, he is paving the way to meet young consumers and shows that it is instrumental and much more inclusive to be present at such an important meeting place for popular culture and the wine industry.

2) A new synergy: wine and design

"The way you win is by focusing on alternative packaging and sparkling and flavored wines," Constellation Brands executive vice president and president of Wine + Spirits Division Chris Stenzel told Wine Business Monthly. "You go where the consumer is."

Allowing wine and design to come together is a way to achieve competitive advantage. Winemakers and brands should seriously consider the role of design as a marketing tool for the wine industry. Design and its relationship to marketing can be very relevant to modern winemaking techniques. In the following paragraphs, we will examine the potential and the possibilities for a design led approach to winemaking.

a. A new conception of wine: stepping away from tradition

Keynes says: « the difficulty lies not so much in developing new ideas as in escaping from old ones. » Wine today is a worldwide drink but the strong perceptions and cultural codes that evolve around it may be difficult to tackle and renew. Wine is a complex, and culture-laden product that may struggle in the face of change. Also, tradition is an important concept in the world of wine, and “tradition” and “traditional” are regularly employed to convey a sense of quality and authenticity. They are powerful concepts in marketing wine and many other products because a commodity (or a service) described as traditional is something that has been around for a long time and it has survived intact because its quality has been endorsed by generations. A good example of that is the labelling of sparkling wines made by what is known as the “traditional method.” The term replaced Champagne Method after the champagne industry successfully reserved that term for itself. It is clear that the use of the term “traditional” is to give historical legitimacy to the sparkling wine. But the history of winemaking is full of interventions, manipulations and innovations. For example, the ancient Greeks added lead, salt water, and even herbs of all kinds to their wine. And in the 18th century, port producers added elderberries to give their wine more color. Thus, innovation is at the core of the evolution of the wine industry, and today, we are confronted with many.

First of all, let's use the example of the shift from bottle to can. It is no accident if this new form of packaging has seen the light today. The dominating force behind a younger consumer's alcohol purchase is finding a product that fits his lifestyle. Millennials and Generation Z are suddenly gravitating towards wine in cans and in boxes. Companies like Union Wine Company paved the way to selling wine in cans, marketing their Underwood Wine for single-can purchases in stores. Union Wine Company placed cans as the main driver of growth for its brand in 2018. Some of the consumers that buy wine in a can are not the typical bottle consumers, but rather former craft beer drinkers that are making the switch. Historically, wine has never given the “can option”. Now that it exists, the accessibility of wine in a can mirrors their lifestyle better. Boxed wine sales also spiked last year by 8%, according to Nielsen. Boxed wine brands, priced between \$5 and \$12, also appeal to millennial shoppers.

More and more, brands are going for a judgement-free, and uninhibited consumption. A great example of this, is the brand EPC Champagne. Edouard Roy, Jérôme Queige and Camille Jullien co-founded EPC in 2019 with the ambition to bring a new vision of champagne, more modern and especially more “conviviale”. It is basically a modern and friendly experience. At EPC, innovation serves champagne with a heat-sensitive electronic device. It is colored on the back label when the champagne is cool enough to be tasted. The brand also bet on augmented reality: the bottle tells its story when consumers scan its label from their Facebook account. Finally, they offer to personalize the bottles or cases by engraving a message chosen by the consumers.

Not only is the product innovative but the entire communication around the product is relaxed, approachable and modern. To meet the consumer demand for transparency the three founders opted for an approachable tone of voice and an easily recognizable packaging. EPC is a variation of a Latin formula, E Pluribus unum (“l'Union fait la force”), which they have humorously transformed into E Pluribus Champagnum. This means “l'Union fait le champagne!” It is also a way for them to mark their singularity with what is done by their fellow champagne-makers.

Finally, EPC is about transparency, quality and modernity. As we saw before, this is the main criteria for consumers nowadays. Concerning transparency or in other words, traceability, the champagnes are 100% traceable. Each cuvée comes from a single terroir, a single year and a single grape variety: chardonnay. Jérôme Queige, general manager of the brand, says in an article by Le Figaro Vin: “There was a real need for renewal in Champagne, in a vineyard that is still very opaque.” To meet this demand for transparency on the part of consumers, the three founders opted for an accessible tone of voice and an easily recognizable packaging. Even if they were perceived as odd, the brand managed to make a positive break. Camille Jullien, co-founder of the brand, explains the reasons for the decline in popularity of champagnes among the younger generation and the response provided by EPC. “Today's 30 year old have strong prescriptive power over their elders” she explains. In order to gain their trust, we wanted to answer the questions that have remained unanswered until now: why is champagne so expensive, how is it made, why is it associated with a celebratory context? We had to find a middle ground between big brands, which are marketing monsters, and the best of the winemakers.”(Le Figaro Vin)

The brand offers a new consumption model by freeing champagne from its codes. Indeed, on each of their advertising campaigns, you can see a group of young people raising “blidas” in the air. According to history, they are the stemless glasses formerly used by grape pickers during break time. "These objects are meant to show that there are many other ways to drink champagne", explains Camille Jullien. As a result, they have become one of the symbols of the brand.

In sum, design offers real opportunities in wine making as a means for developing effective marketing strategies. It is about incorporating the branding in the actual label for example and providing a visual icon that can encapsulate the brand and accentuate the package design.

b. The unboxing experience

The unboxing experience is when shoppers open up a package, take out what's inside, and in some cases, record the moment and share it on social media. This is a huge opportunity for a brand to stand out and extend their image. The unboxing experience as a strategy can be a game-changer for consumers when it is designed properly. Indeed, over the past 20 years, the real challenge for wine producers and wine brands have been to renew their strategies in order to reach the consumers effectively. Moving towards the online world is one of the key issues here.

Today's market is about much more than the product inside of the box. People want to connect with something that is meaningful and aligns with their core values such as being environmentally sustainable and following fair-trade employment ethics. People genuinely want to be a part of something larger than they can contribute to with their purchases, and this connection can be built before they even read the wine label. When designing a product's packaging, it is important to ask: “why just sell my customers wine when I can also give them a complete emotional experience with it?”

After the pandemic, the wine industry has undergone a greater shift to the digital marketplace. That it why it is crucial we turn our attention back to the real world to ensure that the physical interactions between customers and brands have the same quality as the interactions online. This is

where the wine unboxing experience comes in. Overlooking the importance of the physical experience between customers and their wine means missing a key opportunity for brand marketing. With the right unboxing experience though, brands can stand out in the customer's memory and reap the benefits of a unique packaging and unboxing experience.

What can the unboxing experience actually do for a brand?

The unboxing experience (e.g: packaging) plays one of the most important roles when it comes to a consumer's connection with a brand. It goes beyond the quality of the product itself since it is the first physical impression a customer has of a product and brand when they first are in possession of it. Rather than viewing the packaging of a product in terms of its basic functionality for shipping, successful wine brands have actually used it as a sort of second product. This adds to the perceived value of the overall package.

The process of unboxing is able to create excitement, it has an effect of surprise, and triggers a positive emotion in customers. This improved experience associated to the brand, also increases the perceived value of the product itself. In short, unboxing experiences become an immersive retail experience that boosts customer satisfaction. A good way to do so is to use a visually appealing packaging that contains the brand's logo and a small written piece talking about the brand's mission and ethics. Thus giving customers a meaningful point of first contact and connection. The material used inside of the wine box's packaging is also a question to be raised as it can have a positive effect too. This whole process is focused on one's senses: both the visual and the physical (i.e. the sense of touch). The olfactive sense can also be integrated and create another dimension to the unboxing experience. By treating wine packaging as a second product that the customer is purchasing, wine brands have a big advantage. They are not only standing out by giving customers something unique but they are also providing the customer with an emotional connection to their brand and story, they can truly consolidate their branding strategy. Customers will very much likely want to repeat that experience as well as share with their friends.

A very good example is the prestige packaging by Veuve Clicquot. The French champagne house has created many different unboxing experience. They developed this stylish, yet practical, packaging that transforms into an ad-hoc ice-bucket. When the cover is removed, the pleated paper pack unfurls, creating an instant ice-bucket. They also developed the 'Fashionably Clicquot' with the bottle in a beautiful luggage-inspired carrier case, including a convenient ribbon handle. (cf appendix Veuve Clicquot)

As a result, customers will spread brand awareness through word of mouth and might also upload the experience to their social media as part of the latest trend of unboxing videos. This can definitely make any brand go viral. As consumption grows increasingly virtual, we can expect unboxings to follow suit and become more embedded within wider digital experiences. Unboxing will be a critical tool for brands that want to enhance customer loyalty and engagement across channels by using the moment of delivery as the catalyst for further brand interactions. In sum, unboxing experiences are no longer about the customer receiving a box on their doorstep; it's about what that box tells them to do next.

c. Building value

We have talked about "the unboxing experience", "sustainability", and "transparency". These strategies all are part of one big focus that new brands have put a finger on: adding value to the brand and thus to the wine itself. The George agency explains that today, more than 70% of consumers, feel the need to identify to the values of the producers and thus adhere to their principles, to the commitments that they claim loud and clear. Today's market is about much more than the product inside of the box. People want to connect with something that is meaningful and aligns with their core values such as being environmentally sustainable and following fair-trade employment ethics. People genuinely want to be a part of something larger than they can contribute to with their purchases, and this connection can be built before they even read the wine label.

Most importantly, wine is a political object, like all objects of consumption, like everything that will be bought and sold. Thus, when someone buys an organic wine, they are actually doing a political act by supporting a particular sector. When someone buys wine from female winegrowers, they also support the production by women and therefore they deliver an anti-sexist message. Even if not all consumers buy "with a sense of purpose", this act of purchasing a particular wine with a cause often hides a deeper meaning and brands need to be aware of that. Before going into building the value and the vision of a brand it is important to define what "vision" is. According to Service Brand Global, a brand vision refers to the ideas behind a brand that help guide the future. It is the brand's trajectory. When the brand vision clicks, it reflects and supports the business strategy, differentiates from competitors, resonates with customers, energizes and inspires employees and partners, and precipitates a wave of ideas for marketing programs. A powerful brand vision for a product will help to guide the business strategy and outline where one hopes to end up.

Building the value and the vision of the brand can be done through different ways:

First of all, by the integration of the notion of sustainability. Souleil's packaging, for example, is all sustainable. We use recycled paper for the front and back labels as well as for our business cards and the boxes. We don't have any POS system and we use transparent light weight bottles which have a smaller carbon footprint. Second, a brand can focus on supporting a cause outside of its regular sector of activity. Supporting a cause when you purchase a bottle of wine is an extraordinary added value. Souleil Vin de Bonté is partnering with the 5 Minute Foundation, an action-based global movement fighting for cleaner oceans. Thanks to the foundation, more than 29,000 clean-ups have happened in 70 different countries around the globe in four years. Souleil places itself as a charitable brand that gives back by donating annually a part of the proceeds to the 5 Minute Foundation. Through partnering with a non-profit organization and sponsoring an aperitif after the beach cleanups, Souleil shares its vision of sustainability. It is a brand that is value-oriented. Plus, these actions give substance for communicating on different channels whether it be to importers, distributors, sales representatives, consumers, social media and so on. All of this builds a very strong brand identity.

Another good example of alternative packaging that helps build value is the boxed wine by Drink Juliet. Allison Luvera, the co-founder of the brand created a product unlike anything else, that offers high-quality wine in a beautifully designed package. Its mission is rooted in sustainability because

boxed wine has the lowest environmental impact of any wine packaging format. A lot of negative perceptions have generally reduced this type of product as cheap and mass-produced wine. But by designing a patent-pending Eco-Magnum, Drink Juliet bridges the gap between efficiency and luxury. Boxed and canned wine often appeal to anyone looking to lower a wine's carbon footprint and this product also calls for the aspirational lifestyle vibe. Unlike other classic wine brands, Drink Juliet almost exclusively resonates with millennial and Gen Z women.

Third, the brand can work with artists and designers: the famous Champagne house, Moët & Chandon, revisits its star cuvée with an "ephemeral design". It had been 152 years since the Moët Impérial bottle had been redesigned. Moët & Chandon has given American-Korean artist Yoon Ahn free rein to reinterpret the house's iconic cuvée and Nectar Impérial rosé. The reinterpretation of Moët cuvées entrusted to Yoon Ahn is modern and disruptive. The creator, based in Tokyo, is considered a rising star among designers according to the Vitisphère article. This new way to approach wine shows a real value-based strategy and will to innovate.

Why is it innovation? The artist is considered to be one of the "coolest fashion designer on the planet". She used her talents by choosing a minimalist aesthetic to redesign the two vintages of the Champagne house. By coloring the characteristic neck of the two bottles in ebony black and going for a white label that suggests a blank slate, Yoon is acting on a given *carte blanche*. This choice was a great challenge given the recognizable and iconic codes of the House, but *in fine* it was an opportunity to bring a different aesthetic and a new light to these iconic Moët & Chandon champagnes. The use of a design creates a major surprise effect, a sense of urgency and increased desirability. It is a marketing strategy widely used by luxury brands. In the case of a pandemic that has paralyzed the sector and continues to shake it, the champagne houses have every interest in using these artistic parentheses. Who better than expert designers with a sharp eye for aesthetics to redesign such iconic wine bottles with such rigid codes?

This was not the first time that Moët & Chandon had called on designers to give a temporary facelift to these vintages. And within the LVMH group, it would be wrong not to use internal promotion. In 2018, Nectar Impérial rosé, a semi-dry champagne unknown to French consumers, found itself in the hands of Virgil Abloh (also a friend of Jay-Z) and former artistic director of Louis Vuitton.

Finally, it is also new and original to consider a wine bottle as an object of decoration and lifestyle. As Souleil's brand ambassador, I have been working on press relations and pitching a large number of food and wine magazines but not only. Lifestyle and travel magazines are a great way to promote a wine with a beautiful label. Souleil wines featured in lifestyle magazines such as Marie Claire, Travel & Leisure, Vogue, Cosmopolitan, Condé Nast Traveler... and was integrated in the concept of "tablescapes" which is a concept about creating a beautiful and aesthetic landscape on the table. "The art of dining", if I may say. These new communication strategies around the wine seeks to look for new ambassadors for the brand, other than sommeliers or wine experts. In the end, this is all about looking for originality and thinking outside of the box.

In sum, one has to tone down the talk on the "ingredients" and the technical side of a wine such as grape varieties, wine-making methods, pruning, maturation, yeasts, and concentrate more on their

customer tasting the wine. By doing so, the winemaker, the brand, take the customer to a whole new level of experience. They help the customer project himself into the moment. With the rising of wine and design coming together it shows the world that it is not only about technique anymore, it is a sensory experience. Today, consumption patterns are changing rapidly and wine is no longer a product for everyday consumption. It has become more than a beverage and an edible product. It has its own story, its own emotion, its own traits, an identity. That is why the values must transcend the tangible products. As a consequence, when a winemaker communicates on his product and ultimately wants to sell it, he has to ask himself what emotion does he want his customer to feel and how can he make his social media content as genuine and human as possible.

3) The rise of the tech world

a. Digital Native Vertical Brands

Digital Native Vertical Brands (also referred to as “DNVB”) are independent brands born on the internet that focus on a niche product or market and redefine the codes with the new generation of consumers, especially Gen-Z. The main characteristics of a DNVB are: a strong identity, proximity to consumers, a fair price, a niche offer, in-house manufacturing, virtuous values and a qualitative work environment. They basically tick all the boxes the consumers of today ask for. In other words, it is a business model that meets customers' expectations and requires less logistics compared to other companies. Thus, DNVBs are the new category of successful companies, in France and everywhere else.

Most DNVBs do not have a physical store. They just have a website, with an e-commerce category where Internet users can buy the products they like from a usually restricted range. Some DNVBs still choose to have physical premises, but their priority distribution channel remains the Internet. And for good reason: the very principle of DNVBs is to function thanks to the digital world. Most of them are born on the internet and maintain their image and reputation only via the internet. Whether it's for subscription-based DNVBs or more "classic" DNVBs, digitalization is at the center of it all. Nowadays, more than 51% of the world's population is connected to social networks, creating a gold mine of consumers that DNVBs are exploiting. French people appreciate more and more these new Digital Native Vertical Brands, and do not hesitate to order from them rather than from big groups, even if it means increasing the average price of the basket. Quality, community and transparency: these are the three key words for the success of DNVBs in France.

Let's take the example of Haus. During the lockdown, this stylish Sonoma-based spirits company launched a new aperitif, inspired by the nostalgia of enjoying a typical Manhattan cocktail by the fire in a sort of cozy setting. This spicy liqueur with notes of cherries and cocoa, can be served "on the rocks" with tonic or whiskey. Founded in 2019, this startup benefited from new consumer habits that, against all odds, started buying alcohol online. With the pandemic and restriction measures surrounding bars and nightclubs, home delivery of alcohol was gaining momentum. Haus's offer is I surfing on modern times : homemade cocktails made with natural plants. A mission as revolutionary as it is transparent, which goal is to serve the younger generation by offering a better way to drink. On the website, all the products contain a list of ingredients and nutritional information. But above all, the project resonates with the aspirations of millennials for whom afterworks, Happy Hours and

other aperitifs are part of an essential social ritual. Haus also offers its customers a controlled consumption without depriving themselves. Indeed, if the younger generation of consumers want to have go-to beverages, they are no less in search of healthier and more responsible consumption and no longer want to endure the undesirable effects of hangovers, headaches and so on.

Moreover, DNVBs move the lines and challenge the wine industry. Here's another great example in France: Oé, a French vegan/organic wine brand, builds a sustainable business model for the wine industry. Indeed, in a way, Thomas Lemaslé, the co-founder of Oé, rewrites the rules of the vine and wine industry one by one. The main idea of his project was to restore confidence in the purchase of wine. And that meant two things. First, having a very simple, very clear, no-fuss, and a fair wine offer. Second, to have a wine offer that is trustworthy, from real winemakers, and earth-friendly with zero pesticides.

Through this example we understand that DNVB's are crucial to the wine industry because they are able to build a business model that is sustainable for the wine sector. In his own words, Thomas Lemaslé explains the importance of innovation, redefining codes and aligning oneself with the consumer of today : *“So we took the opportunity to change our name and that's when we came up with "Oé" for Oénologie and because "ohé, ohé", we want to be a brand that challenges, that speaks out, that shakes up the lines... and we looked for a base line that corresponds to what we do: "Good by good". Good because I believe that we are all called to do good, as individuals and as a company, and that it is possible. And through good, because we use good wines, what the land and the winemakers know how to do well to do good. Wine is almost a means to generate beautiful things.”*

Another very important aspect is that Oé is not only innovative and sustainable in its branding but also in their wine production. Oé buys the wine in bulk from a producer that they then bottle. That way, they build relationships with the wine growers. This also means that they have hands on all the dry material: corks, bottles, labels, capsules etc. It is there that they do a huge work to enter in all the details, to challenge, to confront everything with regard to their commitments. Indeed, the corks are all natural and come from European FSC forests, carbon negative. The labels are made from 100% recycled waste, the glue is water-soluble, the bottles are adapted to the deposit. All this is possible because Oé manages everything thanks to their whole circular system. Oé shows pretty clearly that it is no longer a question of buying products in large quantities from a brand whose name is lost among competitors and whose values are unclear. Today, consumers want to know which company they are giving their money to, and which ethical principles these companies support. This is the goal of DNVBs in France: to make themselves known to consumers in the reality of their image and to gather a truly committed community.

Last but not least, DNVBs have understood the importance of creating a world around the brand. The universe is what matters most to DNVBs. Indeed, the consumers of today place the sense of belonging very high on their list of priorities. The DNVBs therefore honor the values, the customers but also the graphic and ethical world that evolves around the brand. The DNVB provides access to a unique world with an engaged and active community on social networks. As a result, customers can be connected with like-minded people. This creates communities that are generally caring and convey positive emotions. The goal is to take the customers on a journey with a unique, curated and well thought-out feed, presenting the different products whether in a dreamy or realistic context.

b. Switching to virtual reality

The digital landscape is evolving rapidly, so we can expect technology to be integrated more into the traditionally analog unboxing experience – and for unboxings to occur much earlier in the sales cycle. Where unboxings were once exclusively used in the post-purchase experience, we are starting to see brands experiment with virtual unboxings as a marketing strategy to prompt consumers' appetites and educate them about a product in an engaging way.

Let's use the example of augmented reality (AR) as a part of the unboxing experience. The concept of augmented reality has been around for some time, but it is only recently that retailers have started experimenting with AR as part of their unboxing experience. This isn't surprising, given the huge popularity of AR technology with consumers. 61% of consumers, according to Whiplash, an e-commerce platform, say they prefer to shop with retailers who offer AR experiences. But despite this, just 5% of AR use was projected to be within retailers by 2022. The vast majority of AR in retail is currently being used to assist buying decisions via try-on filters or the placement of items in the home. This means that unboxing experiences represent a massive untapped opportunity for brands to implement AR in a new way. For extended reality initiatives to work, they need to connect the online and offline worlds in a way that is both useful and interesting for the customer. As was explained previously, during an unboxing, the customer is becoming the recipient of a new product they haven't interacted with before. This gives a brand plenty of scope to design an AR experience that feeds off this excitement.

The wine brand *19 Crimes* celebrates the rebellious spirit of the more than 160,000 exiled men and women. The rule breakers and law defying citizens that forged a new culture and national spirit in Australia. This concept of breaking lines is seen in the brand's use of AR. Indeed, they launched a "Living Wine Labels" AR series, where an experience is activated by a wine label using what is called 8th Wall technology, a software that makes it possible to build interactive web-based augmented reality that works on any smartphone without an app. Users simply go on a mobile device and scan any bottle of Snoop Cali Red. From there, the American rapper, Snoop Dog, will appear in miniature holographic form and speak. This technology provides a unique and modern experience to end consumers, which is key to attaining the widest reach possible. The Advisor Wine Industry Network explains that Tactic is an immersive creative and production studio located at the convergence of design and technology. Its team of engineers and designers specialize in experiences and products centered around new digital formats: virtual reality, augmented reality, mobile apps, and real-time 3D experiences made with game engines. Introducing the wine industry to this sector may just be a whole new opportunity for brands that wish to create a new point of contact with modern consumers.

Pushing further, we can also talk about the "next frontier" which is taking the entire unboxing experience, along with the product itself, entirely online. The rise of Non-Fungible Tokens (NFTs) has changed the definition of what is considered 'real'. As demand skyrockets for unique artworks, GIFs, and other digital collectibles, there has been a considerable increase in NFTs that mimic the surprise and anticipation of unboxings. NFTs are individual digital tokens that serve as proof of authenticity and validation of ownership. These NFTs can represent virtual items (like digital artworks) as well as things in the real world (like wine bottles.) They recently caught the attention

of the wine world as an alternative method of bringing investment wines into non-traditional channels. NFT wines also offer winemakers access to new financial markets and customers.

To celebrate its collaboration with Lady Gaga, Dom Pérignon unveiled a digital pop-up featuring 100 bottles of Dom Pérignon Rosé Vintage 2006 and Dom Pérignon Vintage 2010 designed by the American artist for the house. As part of this initiative, the champagne house teamed up with the creative agency Dare.Win and Renaissance NFT to offer buyers a Non Fungible Token. Meaning that each box sold in cryptocurrency within this virtual store were accompanied by a numbered digital work. Every box-set ordered under the form of an NFT was accompanied by a real bottle delivered to the client's home. The digitalization of these bottles is a huge and unprecedented creation for the wine sector.

c. The power of social media

In this section that focuses on the tech world, we will finally talk about the relationship between the wine industry and social media. The relationship between social media and wine consumers: can we envision a compatibility between these two worlds? We will show how the presence of the wine world on social media is a big advantage.

Let's first focus on what Sylvain Dadé brings to the debate during a SoWine talk of 2023: the social networks preferred by the French are YouTube, Instagram and Facebook. That said, Instagram is the one that has the strongest dynamics today in terms of daily users. It is a social network used by a majority of people aged between 18 and 25 years. In France, one out of two people give great importance to advice delivered by influencers. Plus Sylvain Dadé shows in his analysis that, the younger the consumer, the more importance they give to it. But in the age group above 30 years old, they observe a considerable increase in the importance given to influencers' advice. So we can certainly deduce that social networks will soon not only be for the younger generation since the disparity is getting smaller. The wine industry definitely has to bet on that and use it efficiently.

Another crucial point: the effect created by influencers goes as far as generating wine purchases. Indeed, 18% of the 25-36 year olds say they have already bought a recommended wine, which represents one out of five people. Among 18-25 year olds it reaches 34%. And this percentage is still increasing compared to 2022. If we follow this logic, with the rising of TikTok as a new social media platform, influencers should have even more power (appendix 7). However, it is still very new and is missing legal boundaries and a clear framework. Indeed, the most surprising thing is that TikTok is the platform where people follow the most wine and spirits influencers and winery accounts. But this is still a platform that has not implemented the age limit. The platform is thus very limited in terms of effectiveness.

Being present on social media has many interesting possibilities :

If we look at wine knowledge, 27% of expert connoisseurs are major online wine buyers compared to 7% for neophytes. This number is really interesting and usable. Indeed, if wine and spirit brands succeed in attracting this 27% of online buyers, the wine and spirits industry could create a

renowned world living through social media. By doing so, the brand would gain in importance even faster. Also, if we talk about purchasing power, young people are more inclined to give an important budget to the purchase of wine online since 36% of 18-25 years old spend more than 20 euros to buy a bottle of wine on the internet. Sylvain Dadé proves it by bringing these numbers to the analysis. Thus, social networks have an important place in the life of the French people, because they scroll every day. Social networks represent an information space that favors the access to useful information before buying and this is a strong advantage. And above all, today, it is not only used for online shopping but also for information.

While some of the trends did seem to come out of nowhere to industry experts, it is important to see where the consumers are picking up the trends. Social media plays a huge role in millennial and Generation Z's purchasing. Telling the story of your brand in captions will help the younger consumers get to know your label and what your company stands for. Wolffer Estate winery in Long Island, NY, had been in the Hamptons for more than 20 years, but just in 2013 did the brand explode with its "Summer in a Bottle" rosé. The specific brand and bottle helped create and mirror a lifestyle choice among millennial drinkers. The winery rode the wave and went from making 4.000 total cases of wine in 2008 to 48.000 cases in 2021. Brands definitely can learn a lesson from Wolffer's success by crafting a story for their own products thus giving customers a feeling that they keep wanting to feel.

By using social media, brands will be able to start seeing patterns emerge across the generations of their customers, and then make marketing decisions to help expand their reach. Using social media data can also help understand how customers are interacting with the brand, and then the communicating team can make better decisions about the feelings their customers want when drinking their wines. While stakeholders of the wine industry have been implementing new branding strategies and facing a constantly evolving consumer, one can notice that there has been an emerging difference between several countries and cultures. These emerging new branding strategies seem to prompt a race against time to offer the best branding strategies, adapt to the changing environment and attract the new generation of consumers.

III. A polarization between the “old world” and the “new world”

In Neal K. Hustava’s thesis written in 2011 for the Colorado College, he writes:

“Though the wine industry seemed as though it would continue to decline and eventually crash, New World wineries have taken the place of Old World wineries by expanding to different consumers and producing a cheaper product through new age globalization and marketing strategies. This thesis asserts the hypothesis that New World wineries’ production growth and superior marketing strategies, such as segmentation, positioning, packaging, and internet advertising have increasingly led to the decline in wine production and consumption per capita of the Old World countries, as the New World wineries provide an industry lifecycle substitution in the global marketplace”.

He also adds that in the wine industry, wine consumption and production as imports and exports have seen growing numbers in recent years. According to him, the New World countries have, to a large degree, increased their production and exports of wine, while also increasing their consumption. Simultaneously, the Old World countries have slowly decreased the amount of exports of wine and domestic consumption. Globalization, it seems, has benefited New World wineries more than Old World wineries in the increasingly interconnected global marketplace. This statement suggests that there is a difference between the Old World and the New World in the wine business. A difference that seems to explain why New World countries have succeeded better in their branding strategies than those of the Old World.

Today, when we talk about old world or new world, we are talking about a style of wine, a type of practice, rather than a simple geographical location. The opposition can be made between the Old world and the New world because, on the one hand, we have countries that have been producing wine since the beginning of time and, on the other hand, those who have less of a wine tradition and maybe have more space to be original and less traditional. We will begin with this starting point to elaborate our analysis.

When talking about the New world, I’m thinking of countries such as the United States, Australia, New Zealand, United Kingdom and so on. A region is said to be part of the Old world if it has been working with vines and wine for thousands of years (4 to 5000 years BC). We will of course mention France, but also Italy, Spain, Portugal, Germany, Greece, Switzerland, Austria, or even Middle Eastern countries such as Lebanon, Israel, Egypt, or Malta. On the contrary, the regions of the New world are those whose wine activity is much more recent, that is to say for about 400 years. The United States, Canada, Chile, Argentina, Uruguay, Australia, South Africa and New Zealand are the main countries that belong to this group. Between the Old and the New world, we can see different trends in techniques, choices, wine styles, but what we will focus on here will be the branding strategies. In the Old world, the vine has been cultivated since ancient times, so tradition is quite marked. The techniques discovered and tested throughout history are still often used today. For example, some tasks are still done by hand until the harvest. This duration in time has also given rise to strict regulations that the producer must respect if he wants, for example, to have the right to an appellation. In the New world, wine has been produced for much less time. The traditional attachment is therefore less marked. For example, production is more mechanized, the

rules are often less strict, and appellations are not systematically complete. The name of the grape variety or brand is often highlighted on the label rather than the wine region. The flexibility of the legislation naturally leads to more innovative practices in the New world.

Old world traditional winemaking leads to types of wines that are often described as more elegant and delicate. There is talk of more acidity, more tannin and overall balance. Overall, these wines are also better for aging, but are perceived as less ‘racy’. The new world, on the other hand, aspires to seduction through innovation, originality and novelty. They speak of wines that are "easier" to drink. All of these factors explain why branding strategies are quite different.

We can see in the WEP (Journal West European Politics) Newspaper that it highlights the different topics that winemakers identify as crucial for the future success of their business, in the context of threats and opportunities that characterize the global wine market. It indicates that the major concerns of the wine producers are no longer related to the improvement of the technical and qualitative aspect of their products, but rather to knowing (preferably in advance) the nature of demand which is an expanding and increasingly volatile one. The fact is that winemakers are more and more aware that doing a good job in the vineyard and in the winery is not enough if they cannot also appropriately represent and advocate for their wines when they are released on the market. Success is increasingly tied to winemakers’ ability to innovate and go beyond traditional communicating methods. In other words, they have to juggle with what they want to convey and what the consumer wants. The fragility and volatility of what the consumer wants is what is hard to keep up with. In the wine sector, demand is extremely variable.

In the New world, distinguishing the products has become the main priority. Winemakers can respond to the changes in consumer preferences by “inventing” new wines. These countries of the New world are not putting their efforts in changing the core product per say but they are investing in news methods of communication. They are acting on the extended and augmented product, that is the part that comes after the production of the wine, the extension of the product’s life so to speak. To do so, the winemaker must enhance the product by putting forward the characteristics related to the experience around the product. In a nutshell, we can call them all the “intangible characteristics”. In this way, the product can truly be differentiated with greater margins of adaptability to the different trends and the consumer’s desires. The key here is to be easily recognizable and stand out in a positive way.

1) Different countries, different expectations

a. A theoretical “old world” vs “new world”

Several numbers and facts catch our attention and draw us to that observation that these two worlds have something inherently different. For example: 94% of American wineries have a Facebook page against 53% in France. 73% of American wineries have a twitter account against 41% in France. The difference between these two worlds can probably be explained by the different expectations the people have according to the country. Different countries, different histories and thus different expectations.

We see both in the Old world and the New world the need to resort to a collective or public authority that indicates the norm and controls it in order to legitimize and give credibility to the necessary link between a private brand and a collective sign of quality. Appellation, vintage, classification, and more recently grape variety.

However, differences do emerge:

Australia is rightly recognized for the quality of the marketing of its wineries and the importance given to brands to convince and seduce new consumers. (L. Bith-Hong, L. Lockshin. 2003), As in South Africa, the boom began in the early 1990s, and as in South Africa, the profession is supervised by a professional institution of a public nature: the Australian Wine and Brandy Corporation established in 1981 by the AWBC ACT of 1980. Without this act, the Australian wineries would probably not have been able to create this collective force that supports their brands and their quality efforts. This collective effort was made possible by numerous organizations such as the Wine Industry National Education & training Advisory Council, the Australian Wine Research Institute, the Australian Wine Council (for collective promotion), the Australian Wine Export Council (for export assistance), etc. It is this solid and effective network that gives Australian brands "strategic depth" and that has allowed them to establish, notably through packaging, a trustful relationship with new consumers, mainly in Asia and in Anglo-Saxon countries.

All this information provided by the Cairn platform provides a basis for our hypothesis that there is a difference between the Old world and the New world. Nuance: it is necessary to name certain countries in order not to make a generalization. In Chile, the mention of the authorized grape variety allows the country to enter the virtuous cycle of recognition and support for the identification of quality, and also to adapt easily to the changes that consumers will impose in the future. Unlike Argentina and like Australia, Chile is setting an example of an increasingly effective public-private partnership that should ensure the visibility of Chilean brands' quality to new consumers around the world.

Both Argentina and China do not seem to be included in this "New World" vision. The research work of Francois Bobrie, lecturer (IAE Poitiers) explains it very well: China has set up a system for the protection of geographical indications through collective certification marks and a system of controlled denomination of origin is being tested since July 15, 2005. The brands are owned by several large Chinese companies and most of them are developing their ranges by introducing "Domaines et Châteaux" wines, following the Bordeaux model of the 1950s. Since 2007, there has been a specific branch of "Domains and Villages" brands within the powerful Chinese Wine Industry Association, which includes the 300 major companies in the sector. Considering the diversity of terroirs in the vastness of China, China seems to be moving towards the development of typicities rather than grape varieties, just like the French way. That said, it is true that the presence of French technicians in Chinese wineries is dominant.

Although the new countries of the New World (New Zealand, Chile, China) are following the same path as the dominant countries in the world market (Europe, the United States, Australia and South Africa) -meaning they implement strategies that consist in establishing strong collective and public

instances that create standards and control the characteristics selected as quality benchmarks for the final consumer -we must highlight the differences that make us have this conception of the New World and the Old World and how this can be used in our analysis of the new branding strategies.

This main difference would be in the narrative of the value of the wines. This would be a difference of enunciator(s) and not of choice of quality signs.

b. The “French perception” of wine: the fear of the brand

Going back to different expectations: we can simply ask ourselves if there is such a thing as a French perception of wine?

The answer is yes. Simply because countries have a different history and it is deeply linked to the people’s perception of wine and how they drink it. The example of the label is perfect in this case: the traditional French public, in other words, the traditional wine consumer between the ages of 30 and 65 (but especially from the age of 40 to 75) are people who consume wine out of habit. That means that when they buy a bottle, they look for familiar elements, for reassurance in the product’s quality. This phenomenon translates into the search for a label that looks like what they think is a quality wine. They are looking for the so-called "classic" labels that include the name of the chateau or the estate, the vintage... Another aspect to take into account when differentiating countries and habits is that in France wine is intimidating. It is a product associated to the elite and the “happy few” that know the technical aspect of it. Thus, a large part of consumers in France are not confident in their ability to make an informed choice, especially in supermarkets where there are more than a hundred references for a single product category. It is in this context that they go for the "classic" labels, reassuring and supposedly a guarantee of quality.

The Old world has probably kept this vision that they are the best in their communication strategies. They might boast about a quality linked to tradition and history. But as Keynes says: “the difficulty lies not so much in developing new ideas as in escaping from old ones.”

Why? Wine is a cultural product. But what does this mean?

This “traditional” generation we spoke of earlier also has a very anchored and traditional way of considering what wine is as a product. According to a survey lead by l’IFOP (Institut d’Etudes Opinion et Marketing en France et à l’International), “wine is a special product in the eyes of the French”. It is halfway between gastronomy and culture and an essential element of national identity. The study shows that the French unanimously express their attachment to wine, it is "part of the cultural identity of France" for 96% of respondents. It has "a special relationship with the population that is not found in other countries" (90%), and is "a component of the French art of living to which they are very attached" (86%).

Wine is a pillar in French cultural and gastronomic heritage. In 2014, the Senate voted an amendment on wine and our cultural heritage: "Art. L. 665-6. - Wine, a product of the vine and the

wine-growing terroirs are part of the protected cultural, gastronomic and landscape heritage of France." It should also be remembered that French gastronomy has been listed by UNESCO as part of the intangible cultural heritage of humanity since 2010. As the bearer of a thousand-year-old history, wine is closely associated with the culture, heritage, landscape, literature and economy of our country. By law, wine is associated with heritage, culture and even literature. Yet literature is often impervious, esoteric and belongs only to the "happy few".

Moreover, Charles Danzig writes: "Literature is a higher form of art". So, if wine is the main subject of literature, therefore it makes it an object of the elite, a high standard one. A perfect example of this is the French poet, Charles Baudelaire, who has written about wine in a number of poems such as "L'âme du vin" in *Les Fleurs du Mal*.

We talked about expectations. There also are different landmarks according to the country. For example, the notion of brand might as well be premium in the USA, but not in France. Indeed, for French traditional consumers, the notion of brand is more pejorative. It brings on concern and worry. People do not trust the brand because it is not a synonym for historical origin as a famous estate or producer has. A very telling example that illustrates that fear is the Gérard Bertrand brand. It is known all over the world for its wines. The group offers wines for just about every profile and budget, from entry-level wines such as *Gris Blanc* to a high-end wine such as *Clos d'Ora*. There is a huge difference between these two wines and the most important one is the end consumer. Many industry professionals scowl at the mention of Gérard Bertrand wines, saying that they are not the wines of winemakers and have no place on fine tables. The rather outspoken opinion can be qualified as absurd because brands do have their place on "luxurious tables". As Ewa Crétois, my Digital Communications professor at l'ISV, says: "What's important is not so much that it's a brand, a château or a business. What counts is what you tell people." Thus, it is important to keep speaking in favor of brands, the wine world needs them.

c. The "anglosaxon" approach of wine branding

On the other hand, the anglo saxon approach has a tendency to go for the 'new'. Storytelling, and thinking outside the mold seems to be much more easier.

The example of the brand Yellow Tail is a perfect one. Yellow Tail is an Australian wine brand that, from its small and humble beginnings in 2001, has become one of the world's most profitable brands in the industry. It succeeded to open its own market in the United States, in Japan and in the United Kingdom. The brand was founded in 2001 by the Casella family from Sicily. When the family decided to launch a new brand called "Yellow Tail" they had an innovative brand positioning in mind. Indeed, their vineyards did not have the same reputation as the ones in Europe, so they could not target the market of wine connoisseurs. Therefore, the Casella family decided not to compete with French or Italian wines on characteristics such as quality, product complexity, or vineyard prestige. Instead, they presented their brand as fun and approachable and targeted a new type of wine consumer. We can say that this is at the core of new branding strategies initiated by the anglo saxon countries.

In their book, Kim & Mauborgne explained how Yellow Tail used what they call a "Blue Ocean Strategy", which consists of escaping the overcrowded market. The overcrowded market is referred

to as “red ocean” where all the sharks are attacking each other. Diving into a blue ocean where there is no competitor is what Yellow Tail did. The oceans in question are markets, and in blue oceans, demand is created rather than fought over. According to their academic paper, the brand succeeded because it did not just offer wine, but a new type of product within the wine industry. The company was able to identify and answer the needs of a specific and new market by applying two main actions used to help create value and innovation.

First, they bet on simplicity by reducing:

- wine complexity
- vineyard prestige

Second, they banked on creativity:

- easy drinking
- ease of selection
- fun and entertainment

Yellow Tail’s first objective was not to compete with premium wines. What they did instead, was to create a wine that people would purchase because it tastes good, without thinking about the complicated rules of purchasing wine. Kim and Mauborgne explained in their book that “instead of offering wine as wine, Casella created a social drink accessible to everyone: beer drinkers, cocktail drinkers, and other drinkers of non-wine beverages”. Yellow Tail is easy to drink, recognizable, fun, and adventurous. It especially puts a non-traditional twist on a traditional product. It represents well the Australian culture with its bold yet laidback image that thrives on adventure and fun.

How does the brand demonstrate a product innovation strategy? It offers wine that is produced without tannin and acid, in order to appeal to consumers who are not wine savvy. That part of the population represents 85% of the American population according to Renée Mauborgne. Yellow Tail developed a wine that is as approachable as beer and ready-to-drink cocktails. It resulted in an easy-drinking wine that did not require years of experience to develop an appreciation for it. Moreover, in order to avoid confusion, consumers could initially choose either a Red Shiraz or a White Chardonnay. Last but not least, the product can be consumed immediately; there is no need to keep it in expensive wine fridges or underground cellars to age the wines. This also simplifies the consumption process. Yellow Tail basically developed other qualities that would make it more appealing to non-wine drinkers.

Staying in Australia, Good Pair Days is also a good example of this same innovation path. It is an Australian personality subscription service. They are a sort of “wine match maker” to give the consumer the wines they like. The consumer can subscribe to a monthly wine box or order one offs depending on their needs. Their “about” says: *“A few years ago, a world-famous sommelier, a tech genius, and a total wine newbie walked into a bar. It sounds like the start of a bad joke, but was actually the start of our great little company. Aside from wondering what a ‘dry wine’ actually meant, the newbie had a question for them: did they want to be part of a mission to help everyone — from newbies to aficionados — discover and experience the joy of exceptional wine, tailored to their tastes? To remove the confusion and jargon, to make wine accessible and enjoyable for all?”*

They did. And they've been pairing good wine to good people ever since.” Good Pair Days’ goal is to allow consumers to discover new wines, empower their palate while enjoying themselves along the way. The tone of voice is modern, fun and upbeat but still wine-savvy. Also, they do a real work on the website by giving a special attention to the ‘look’ and ‘feel’ of the company’s image. They target a clientele that ages from 25 to 45 years old. So, their goal is to appeal to young consumers and make the whole learning process around wine an enjoyable experience and not an intimidating one. This tone of voice and specific world of Good Pair Days is also successfully conveyed in their newsletter. (cf annexe)

Some exceptions that are top of mind: the Champagne region and the Gérard Bertrand Group. Gérard Bertrand, nominated “best wine maker in the world” by The Wine Enthusiast, is today the figure of the prestige of the Languedoc wines. By building a strong brand identity he has paved the way for new branding strategies in wine in France. So, if we dig a little deeper, the polarization is not that simple. The New world encounters the same problems that we associate to the Old world and both contain emerging brands that try to challenge the wine industry by being innovative and transcending the strict rules and the consensus around wine branding. The new world also seems to encounter struggles linked to “old perceptions and habits” around wine.

“The American industry has an old people problem” says Eric Asimov, the chief wine critic of the New York Times, in his article published on Jan 26, 2023. Younger generations in the USA are expecting more from the marketing strategies. They want to be inspired and their curiosity to be awakened. Erica Asimov’s solution is to find an audience with younger consumers, American winemakers need to make changes, and fast. Thus, both the New world and the Old world are encountering the same challenges and may not be so different. At first glance, the Old world seemed to struggle with change in communication and branding strategies and those in the New world seemed more pertinent. But it is more of a question of what is adapted to one’s audience. The new world is starting to be “eligible” and ready for branding strategies of the new world that were not relevant before then.

2) Trends going beyond country borders

a. Building a brand

First of all, we can say that the concept of “storytelling”, whatever the country is, it is for the consumers a way to identify many qualities that are told by the brands. The origin allows to talk about typicity, the vintage allows to tell a guarantee of authenticity, the grape varieties allow to tell the variety and the gustative homogeneity, the classifications allow to tell the organoleptic variety in the typicity. And all these signs are also capable of telling extraordinary socio-cultural stories.

It is interesting to see how some successful brands in France have adopted the new branding strategies. The importance of the individual branding has gone beyond borders. Branding is crucial in any industry, company or product, and is growing in its importance for the wine industry. According to David Higgins, Brown Forman Beverages Worldwide Wine Group President, “in the wine business people do not understand the need to build brands. That will become more and more of a problem among mid-size wineries” (Westling, 2001). Some successful brands in France have adopted the new branding strategies and have understood the new challenges. I think that the

Champagne houses are the best example. Juliette Bory was able to enlighten me on the subject. We mentioned earlier the Champagne brand EPC. This is a perfect example of a brand that has shown innovative branding strategy that have gone over borders. Beyond the change in the tone of voice, which appeals to the younger generation, they quickly understood that the expectations of foreign customers are more or less similar. At the beginning, 70% of their market was located in France. In just three years, they are now present in 30 countries and continue to seek out new consumers. Their greatest satisfaction: being copied by others today. The brand succeeded in creating a model and convey a real energy. It seems that consumers were waiting for this fresh wind in Champagne around the world.

During the interview with Juliette Bory, she also shows how Champagne has been the one making the effort towards innovation. She compared the independent winegrowers' tradeshow and the Grand Tasting at the carousel of the Louvre. At the grand tasting, there is no buying. One goes there simply to observe, discover and taste. Another very important point is that you can find your way around the show according to the brand names. For example: the Taittinger booth carries the logo and the slogan “L'instant Taittinger”. At the independent winegrowers' show, the universe is completely different because booths are located according to their appellation and not according to the name of the winegrower. This seems logical because historically the winegrowers have gathered in trade unions and professional federations. They have always learned to communicate collectively (PDOs are collective brands). But the problem is their individual brands have disappeared. As a result, the industry has to reverse this trend and talk about an individual brand instead. Otherwise, individuality gets lost in the collective identity.

The Champagne region has succeeded in actively defending the appellation and at the same time the “negociant” part of the trade has been able to create strong and individual brands. This is a real collaboration between the wine merchants and the winemakers contrary to what we can see in Bordeaux. There is no such fear and pejorative vision of the “négoce”. The conclusion is that the Champagne negociant is there to pull the Champagne upwards and it does it very well by putting forward its individual brands.

b. Blurring the lines of winemaking

A successful French Champagne brand that is leading the way for new branding strategies and offers a way to renew the perception of winemaking is Dom Pérignon.

The Dom Pérignon way is a perfect example. The brand released its latest video directed by Woodkid for the collaboration between Lady Gaga and Dom Perignon. We can definitely say that his video is a no brainer. Why?

Since 2021, Lady Gaga has become the new face of Dom Pérignon. It is a collaboration placed under the sign of creativity and innovation that allows the champagne house to open even more to the world. In early March 2023, Dom Pérignon launched a new campaign in the US to highlight the creative parallels between art and winemaking. This campaign marks the release of the 2013 vintage of Dom Pérignon. And what they did is an innovative idea. By allowing art and winemaking to come together, the brand is able to rally Lady Gaga fans, non-drinkers and art admirers to

discover the world of wine. This way, wine making is sublimated and seen in a new light. Dom Pérignon wishes to convey the idea that a great wine is created in the same way that an artistic work is composed: with rigor and passion.

Through the shots depicting Lady Gaga sitting at her piano with a troupe of dancers in the background, both the passion for winemaking and art work become one. The celebration for the artistic winemaking process successfully transpires on screen and accurately shows the quest for harmony. All of this is done without even obviously mentioning the product itself.

c. The mixology trend

Mixology may seem like a new form of art, only recently becoming fashionable but it actually has roots back to the nineteenth century, first appearing in a published piece of text in 1862. Less than 10 years later, the ‘mixologist’ was a profession on the U.S. government register with people flocking to bars to see them work their magic. It was these years that occurred the biggest expansion of mixology and its official birth. Although, the idea of mixology and how we know it, has much more resemblance to the cocktail culture that came much later. Today, cocktail culture has seen a steep rise in popularity recently and it is becoming a well-respected and sought-after profession within hospitality, propelling cocktail creativity to the forefront of industry minds.

It is important to say that, until recently, the cocktail craft, had not been noticed in great detail, and certainly hadn’t obtained the buzz we see today. To some, the idea of mixology simply was a bartender job, a simple task of mixing random ingredients in a glass. But mixology, has turned into an art, a movement, and cocktail culture. Now bar chefs are learning, training, and becoming educated in ways that have truly elevated the craft. This is happening in cities around the world, from the US (Chicago, New York, Los Angeles) to France. With consumers seeking a unique and customized experience, mixology is gold for brands. From a consumer perspective-getting a tasty, hand crafted cocktail from these ‘artists behind the bar’ enhances the drinking and dining experience, and brings an added level of creativity to the process.

With consumer interest in sweet wines dwindling, Sauternes has been difficult to sell. As a result, some producers are looking to mixology as a new sales avenue. Even though Sauternes is one of the most respect fine wines, people’s drinking habits change and the appeal of sweeter wines lessens. ‘Over the last decade, we’ve seen consumption going down,’ confirmed Miguel Aguirre, vineyard manager of the historical Sauternes château, La Tour Blanche. ‘We produce more than we sell. For many, Sauternes is just a dessert wine. We need to promote a new way of consumption.’, he says in Decanter’s article “Sauternes, shaken or stirred”, May 1st, 2023. Château Lafaurie-Peyraguey is among producers using Sauternes in cocktails. The Lalique restaurant (1 star in the Michelin guide) of the Château designed a simple cocktail. The idea was that people could experience their Sauternes in the form of a fresh and harmonious cocktail, served as an apéritif or as a simple drink throughout the day. Romain Iltis, the wine director of Lalique Group explains the cocktail is an apéritif-style drink consisting of the château’s second wine – La Chapelle de Lafaurie – and orange zest, poured over ice.

After analyzing the different trends and approaches that we can see depending on the country or the culture, we will finish this essay by giving recommendations, guidelines. These recommendations stem from this research work that has allowed us to see more clearly what is important in a branding strategies and what is truly at stake. These guidelines also stem from personal experience and observation during the apprenticeship.

3) Recommendations for the wine and spirits industry and their brands

According to Darwin's theory on the origin of species, in nature it is not the strongest of the species that survives, nor the most intelligent, but rather the one most adaptable to change. We can absolutely observe this in the wine market. Indeed it is not necessarily the best winemaker that will survive but the one that is the most responsive to change.

a. Brand awareness

The wine and spirits industry has values that are important to young consumers, even if they don't see it or realize it yet. At the core, the wine industry is about producing a natural product that enhances life, creates fun, gatherings and experiences alike. Wine will never be a health beverage, but it demonstrates really important values. The wine industry is also about giving generously for causes, advancing green practices, caring about where and how the grapes are sourced and grown. The young consumers have to learn to see the industry in that light. Brands, estates, producers will help them by communicating in a certain way and working on their branding strategies. Being responsible stewards of the land, using natural resources conservatively and being mindful about the planet is the main goal.

All of those qualities are important to younger consumers, but the fact that these consumers don't see the wine industry in those terms is a failure of unified industry messaging. Indeed, many producers make wine with organic grapes, take a minimalist approach to winemaking, stay away from additives, are biodynamic farmers, use sustainable methods of farming or produce a low-alcohol wine. Basically, they are keeping up with the population's desire for cleaner food, produced without agro-chemicals. But, the problem is that these efforts those wineries and vintner make aren't being used for marketing purposes, even though the winemaker and winery owner must believe that those efforts make better wine. That is often linked to the fact that producers don't have the time to give a certain amount of their time to communication and marketing or even allocating a budget for it. The first step would be for them to work on their consumer message to build a sustainable business model.

Without starting to talk about branding strategies, I noticed something simple: with the arrival of technology and computers, wine merchants now have customer files that they build up as orders are placed. In addition to the wines that are purchased, the wine merchant notes the customer's tastes, his appetite for tannins, alcoholic profiles, or other. The customer file is the main benefit of going to a wine shop, beyond finding more specialized references than in retail. People like to find something that suits them, a place that adapts to them and their needs. The quality of advice given and the relationship that is built is crucial. That relationship can be built by starting with the use of new digital tools. And contrary to common belief, in this case, it doesn't dehumanize.

I believe that one of the best approaches, which has already been chosen by some wine companies, is to address a world in which everything is constantly going faster not by closing in upon oneself but, on the contrary, by plunging into this world: not changing one's identity but "expanding" it. The winemaker should, therefore, not act only on the core product but should look beyond. Wine brands have stories to tell that are going untold. Learning to weave your signature story through everything that you do, from your wine production and winery design, through your carefully crafted wines, to your labels and marketing materials, events, charitable causes, and social media campaigns, with an eye on consistency, will make your brand stand out.

One of the ways to do that can be through the influencer relationships and collaborations. Social media has become one of the most powerful marketing and public relations tools wine brands can wield. Image posting coupled with anecdotes and hashtags, when done consistently, will bring followers that may convert into customers. Wine brands in the know are harnessing the power of Instagram, in particular, to tell engaging stories about their vineyards, vigneron, winemakers, history, future, events, activities, passion projects, and guest accommodations. Influencers are people with social power so to speak. They have built their own audience based on the niche content they produce. Today, they are considered authority figures because of the social influence they exert on people through their specific content, aesthetic, branding and an eye for quality. Basically, they have done the hard work of attracting and rallying a trusting and engaged audience around them. An audience, that as a wine or spirit brand, we can access, often times at the cost the shipping of several samples.

The major advantages of having a feature on an influencer account is that it immediately increases the brand's trustworthiness to potential customers and could be more cost-effective than running paid advertisements for a large audience. There is nothing more effective than mouth-to-mouth recommendations. Basically, brands have to understand that social media bring wine amateurs together : creating a community. It will not distort or denature the product, quite the contrary. Another advantage with social media, and particularly Instagram, is that posting and reposting user-generated content is a strategic way to increase your follower's engagement with your social media and your brand. It not only makes them feel recognized and important, but it also establishes reciprocal loyalty. Instagram boasts the highest interactive engagement of all social media channels.

Famous Champagne houses are the proof of that. Perrier Jouët has 144K followers on Instagram, Veuve Clicquot has 279K followers, Bollinger (153K followers), Krug (203K followers), and Taittinger (121K followers). All these brands have blossomed along with Instagram. However, the use of social media whether it be Instagram or Tik Tok, must remain relevant for the brand. Petrus for example, does not have its place on Instagram. It is based on extreme luxury, mystery around the creation of the wine so it would be contrary to the brand's identity and deserve the it.

b. Focusing and building on renewal

Building on renewal for a brand is crucial, it allows the brand to keep being in touch with the changes in the industry as well as the customer's expectations. Above all, it also gives a breath of fresh air, something new to look forward to. Renewal is a metaphor for sustainability, for innovation and that is a crucial aspect to include into a brand.

A great example of this is the launch of Renais. A new gin brand by Emma Watson in partnership with her brother, Alex Watson. She is the last celebrity to get into the spirits business with the launch of a new gin in partnership with her brother Alex. But this isn't a just a classic London dry gin, it has deep ties to winemaking, starting with the fact that it's made from a grape spirit base.

The notion of renewal is present in all its facets. First of all, the name of the product refers to "Renaissance", renewal in French. The production of the gin is also based on renewal. Indeed, Renais Gin is made from a base spirit distilled from the byproducts of the winemaking process instead of grain. It is upcycled French pressed wine grape skins and lees. Debris that would have been thrown away. Bu using upcycling grapes from vineyards (including Christopher Watson's) the brand reduces waste and creates something new, being one of the only gins on the market using mushroom packaging, and having a carbon neutral product status. The beauty of Renais is that while it is about the renewal, the Chablis region evokes the Watson family's history in the region. It captures the essence of a specific terroir, the unique terroir of Chablis, by drawing on the traditions, techniques and ingredients from the land.

c. Personifying a brand

In an article, Vitisphère introduces a tool created by Sowine. It is worth mentioning here because it is a marketing tool called the brand platform. It lists the identity, values, missions and promises of the company and is produced prior to a communication strategy. It is the result of a precise methodology dedicated to wines and spirits, as Marie Mascré, founder of So Wine reminds us: "We start by elaborating a marketing audit that will allow us to target the strengths and weaknesses of the brand, before doing a benchmark (analysis of the competitive sector and other players), we analyze the best practices which will allow us to formulate the brand platform, to define the targets and to deduce a communication universe." It is a real introspective work not to be taken lightly.

If we go further on how to implement a good branding, here are several steps to adopt. By personifying a brand, we are giving them humanly aspects so that they can more effectively reach another human being: the target consumer. It is not about age, gender, or social and professional categories anymore, it is about what the target wants to feel when they buy the product, how they want to be perceived, what they aspire to. Thus personifying a brand is about giving it depth, complexity, substance and not just an age gap or a gender.

Souleil is a brand - it is not a human being, it is a brand. But as a brand, it has a human aspect to it. Marianne and Thomas are the founders of Souleil and their voice is very heavily involved in the brand. You can definitely feel a piece of them in it. When they were creating Souleil they worked really hard on creating a brand message, a brand feeling, a brand voice and that is crucial when building a brand because as we said, you need to personify in order for it to connect with the people who potentially want to buy it. Indeed, people buy things based on whether or not they feel intrigued by the product, whether or not they feel connected to the product in some way. When faced with a choice to make between two identical products in terms of ingredients for example, the person is going to go for the bottle they like the best, the one that has an impacting motto or phrase on the box that represents the brand as a whole.

Brands that have an identity make sense and in order for customers to connect with it, the people who are running the brand need to create that voice so that the brand may speak for itself. That voice will naturally stay consistent because it is not a conscious being that can change its speech from one day to another. If the tone of voice is well made, the brand stays consistent with their identity and personalities. Fortunately, brands are not humans, but making them seem like it, is where the power lies.

Using the Proust test can be a great way to start working on personifying a brand. This allows to really work on introspection and on every aspect of the brand. Here is an extract of a work done in the Digital Communications course in which I chose to study the Dom Pérignon brand through the Proust survey:

1) What is DP's expertise ?

DP has bet on modernity, the concept of luxurious and exuberant parties. It is in the air of time. All the while, DP remains a classic and provides an exceptional and timeless experience through food and wine pairing. There is almost a parallel with "the food of the gods".

2) A movie?

The Great Gatsby.

Why ? The Great Gatsby is a movie built on symbolism and depicts indulgence and luxury at its finest point. It contains lavish parties, characters living on the edge and a touch of mystery. In a way, it is also about breaking free from conventions : the superficiality of the aristocracy and the rules it imposes on its members.

3) Who does DP go out for drinks with?

DP is best friends with the beautiful Italian Bvlgari. She's her soul mate and has the same vibe. In the sense that these two are modern adornments freed from the transience of nature. Bvlgari captures and immortalizes the magical splendor of life in sumptuous and timeless creations. Bvlgari makes DP even more fun and sometimes debauched and that's why DP loves her. If they came to spend slightly more time together, they might even become lovers.

"When great minds collide and begin to inspire one another, creativity cascades into a chain reaction of endless potential" is the best possible way to describe their relationship.

4) What is the essential quality to be a customer of DP?

A DP customer is a social person who loves to go out.

5) If DP was a person and walked into the room, what three things would we think of her at first glance?

Iconic (she has impeccable taste)

Smoky an obscure (she is definitely hiding something crazy about her)

Haughty (her sassiness is what makes her iconic)

Overall impression : that person has made it to the top.

6) *Does DP have a sense of humor? If so, how much?*

DP has a sense of humor to a certain extent. It could be spicy and sassy. He couldn't laugh about himself though. Self-mockery is not his strong suit. That is because he takes himself seriously, sometimes too seriously. He is completely aware of his value and of his effect on people. If DP doesn't have a lot of humor he certainly is the life of the party.

7) *What brand in the industry inspires you?*

Our inspiration would not be a brand per say but more individuals. Authentic individuals. In that sense, Lenny Kravitz is one to inspire us. He's the definition of creative freedom.

8) *What topics do you not want DP to be associated with?*

Politics would be an utter disaster.

9) *How does DP dress? (see DP's moodboard in appendix)*

DP dresses enticingly gothic. He also has luxurious accessories. His go-to colors are binary associations such as black and green, pink and black or gold and black. He's more into gold than silver, and often has a leather or metallic touch. His outfits are never half-measured but always a statement.

10) *When people interact with the brand, how do you want them to feel?*

People may tend to feel uneasy, like they are outsiders and too far away from the ideal that DP represents. In appearance, he is condescending, smug and haughty even though he does not necessarily mean to be. People even become a bit jealous and want to feel that sense of fulfillment and accomplishment DP seems to feel. We want people to feel impressed but wanting and desiring at the same time.

11) *How do you want customers to feel about themselves? What self-perceptions do you want to encourage?*

Dom Pérignon wants its customers to feel like they own the world, like they are unstoppable and incredible people. If you're a DP customer, the brand definitely gives you an impression of a certain social belonging, being part of the "new money" world. You are also sociable. However, if you're not a customer, you can feel left out and somewhat demeaned.

12) *When asked about Dom Pérignon, what do you want customers to say?*

We want them to say that they feel utterly free while drinking that kind of champagne and discover parts of themselves that they ignored. They now feel surprisingly unconventional and empowered. If DP customers were intellectuals and philosophical they would say that DP offers a fullness that seems to be offered by God himself.

Through such a survey the brand in question emerges with a very strong personality and a whole creative universe which makes it easier to explain, convey and ultimately sell to consumers.

Last but not least, brands and producers have to create marketing pitches telling what their wine is, not what it is not. Positive communication is also very important. The marketing tactic that throws shade at other wine producers with sweeping generalizations in an attempt to lift one brand is a shortsighted approach and a harmful one to the wine industry. It is way better and much more positive to say “Our wine is made from organically farmed grapes and contains natural yeast » rather than « Our wines don’t contain fungicides, glyphosate, pesticides...”.

All in all, having a specific tone of voice allows to really speak to your audience. And the main goal remains to recenter the brand around one coherent and homogeneous image.

Conclusion

The changing needs of consumer has shaken the wine industry to its core. They have forced brands to look at their wine not only as a product but as an experience and a story in itself. It is not about the edible beverage that is contained in the bottle anymore (even though quality is a requirement) but rather about the storytelling, the tone of voice, how the brand actually has a personality. The changing consumer has forced winemakers, wineries, brands to find the ingredient that makes them unique, to really think about who they are and what they wish to convey. All in all, the work has to be done especially in the communication and marketing department. When communicating, having a clear and consistent brand tone is essential to creating brand preference. Brand preference is what makes consumers choose you over your competitors. Contrary to popular belief and to what people used to do before, consumers don't base their choice on product or service quality alone anymore.

Moreover, today, the number of wine brands is overwhelming. The big opportunity that the wine sector has is that wine drinkers love having all these choices but the crowded shelves make it tough for wineries to establish a distinct brand and truly stand out. Competition is key now that the consumer is not only demanding, but is also aware of political, environmental and social issues around him and is becoming more and more curious about wine. We are not talking about wine educated people but at least amateurs and wine-savvys. For most wineries and vineyards, the challenge is two-fold. First, they must compete with the major brands that dominate the market. Second, they must fight all the other brands for the remaining market share.

From a difficult environment, brands have risen above and used art as a major uplifter and a competitive advantage. Creativity and innovation are the two main phenomena emerging from the challenge the wine sector faces. That is not something the wine industry should be afraid of, but rather embrace it. The key is simply to leverage the factors that matter most to the audience you want to attract and create a brand universe.

APPENDIX

PART 1: INTERVIEWS

Interview 1: Juliette Bory - co-fondatrice de l'agence George.

Elle accompagne les vigneron dans leur croissance afin qu'ils puissent repousser les frontières de leur marché.

Ses objectifs pour les vigneron : Attirer de nouveaux clients et augmentez leur chiffre d'affaires.

-Sortir de la masse en misant sur leur singularité

-Leur permettre de faire les bons choix stratégiques pour gagner du temps

Juliette maîtrise 4 piliers cruciaux 1. La Stratégie Marketing 2. La Communication 3. La Stratégie Commerciale 4. Le Juridique.

Bonjour Juliette, j'aimerais d'abord avoir votre avis général sur l'opposition entre le Nouveau Monde et l'Ancien monde dans le vin. Pensez-vous qu'on peut opposer ces deux mondes? Quelles sont les limites?

Je pense déjà qu'il y a un retard évident oui en France et en Europe dans l'industrie du vin. Cependant, il serait trop simpliste d'opposer ces deux blocs. Ce n'est pas si simple de dire que l'ancien monde devrait appliquer les nouvelles stratégies de marque anglo-saxonne sur les producteurs français.

Il faut prendre en compte l'historique du pays. Prenons l'exemple évident de l'étiquette : le public français classique, autrement dit le consommateur traditionnel de vin qui se situe entre 30 et 65 ans (mais surtout à partir de 40 ans jusqu'à 75 ans) sont des gens qui consomment du vin par habitude. Lors de leur achat d'une bouteille, il cherchent à retrouver des éléments familiers, d'assurance. Ce phénomène se traduit par la recherche d'une étiquette qui ressemble à ce qu'on pense être un vin de qualité. Les étiquettes dites « classiques » qui comportent le nom du chateau ou du domaine, le millésime...

Autre point, les consommateurs n'ont souvent pas confiance en leur capacité de faire un choix éclairé, surtout en grande distribution où on est confronté à plus d'une centaines de référence pour une seule catégorie de produit. C'est dans ce contexte qu'ils optent pour les étiquettes « classiques », rassurantes et soi-disant un gage de qualité.

Mais aujourd'hui ce phénomène change peu à peu car les gens consomment de moins en moins des vins qu'il achètent en grande surface: la situation d'hyper choix est moindre. L'achat dans une

épicerie par exemple est une situation très différente et qui plus est, on peut se faire conseiller par un spécialiste, et laisser de côté cette conception autour de l'étiquette « classique ».

Enfin, le plus important est de rappeler que chaque pays a différentes attentes (régies par les consommateurs). D'un pays à l'autre, ce ne sont pas les mêmes catégories de consommateurs, et donc des habitudes différentes.

La France commence à voir la catégorie de jeunes consommateurs émerger et c'est pour cela que les tendances suivent.

Par exemple, les produits de Casella Family Brand commencent à peine à arriver en France car les attentes évoluent. Cette entreprise familiale possède certaines des plus grandes marques de vin telles que Yellow Tail ou encore Peter Lehmann Wines mais qui étaient encore peu connues en France.

De même, ce qui fonctionne aux USA, commence à arriver en France. Le fait de segmenter d'avantage le marché et de réduire le nombre de personnes qu'on inclut dans notre public cible est pour l'instant beaucoup plus appliquée dans le « Nouveau Monde » tel que les US.

Ils ont compris qu'il existe non seulement différentes catégories de consommateur qui sont intrinsèques mais qu'il existe aussi une autre façon de segmenter. Celle-ci se fait par typologie de consommation autrement dit à quel moment un consommateur va consommer son vin. En effet, un même consommateur peut consommer des vins différents à différent moment de la journée.

Par exemple, il existe des vins purement « brandés » pour un moment précis. Que ce soit un vin barbecue ou vin pour soirée entre copine.

Dans tous les cas, il faut que le produit apparaisse comme évident pour le consommateur au moment où il en a besoin.

-Peut-on dire aujourd'hui que les consommateurs ont d'avantage de connaissances sur le vin?

Parmi toutes les nouvelles habitudes que l'on observe chez le consommateur, une est à prendre particulièrement en compte: les gens se forment au vin. Il existe aujourd'hui beaucoup de formations qui fleurissent sur la dégustation, sur les différentes techniques de vinification, les régions etc. Les gens sont donc plus éclairés qu'avant et ont donc une plus grande confiance en eux quand il s'agit de choisir le vin qu'ils vont boire.

Pourquoi ça? C'est dans l'air du temps de vouloir contrôler ce qu'on consomme et en matière de vin il faut d'abord le comprendre pour pouvoir être en mesure de contrôler ce qu'on consomme.

-Quels sont les principaux conseils que vous donnez aux producteurs/aux marques que vous aidez pour que leur produit soit mieux compris et in fine venus?

Il n'y a pas une seule solution: Dans mon agence nous ne faisons que du sur mesure. La solution dépend du public cible et dépend de la connaissance du producteur sur certains sujets. Il faut donc se montrer adaptable à toute situation.

Je suis convaincue, malgré les chiffres qui témoignent de la baisse de consommation en France (et notamment en Grande Distribution), qu'il y a pleins d'opportunités de développement dans le vin à condition de réfléchir à une stratégie efficace, et surtout, centrée sur le consommateur.

Placer le consommateur au centre de sa stratégie est aujourd'hui primordial. La principale difficulté que nous rencontrons dans l'industrie est qu'il est encore difficile de prendre la décision de réduire l'audience à laquelle on cherche à plaire. Les producteurs le comprennent mais cela reste contre intuitif.

Autre point très important: Il ne faut pas faire de compromis quand on construit sa stratégie de marque. Il faut miser sur l'individualité de notre marque et de nos vins. Côté consommateur, aucun compromis n'est fait non plus. Chaque consommateur aime ce qu'il aime et ne sera pas forcément flexible. Alors il faut partir du principe que notre marque trouvera forcément un écho quelque part. Car on ne peut pas plaire à tout le monde, sinon on plait à tout le monde et à personne en même temps.

Cette réflexion est parfois contre-intuitive pour les vignerons et les marques car quand on est dans une urgence commerciale, comme la plupart des producteurs, on va chercher des solutions à court terme. Cette course perpétuelle aux acheteurs (B2B) empêchent les producteurs de se poser et penser à travailler la marque et l'audience. Or le travail fait en amont sur public cible, l'image de marque, est un service rendu au distributeur. Si l'image de marque est facile à saisir elle sera toujours plus facile à transmettre.

Le seul conseil « universel » que je pourrais donner serait le suivant: Il ne faut pas se bagarrer pour des parts de marchés. L'important est de se concentrer sur le public viable et qui s'intéressera à votre vin pour des raisons propres. Ce sont ces personnes la qui seront ambassadrices de vos vins et de votre marque.

-Quelle est pour vous le meilleur exemple d'une marque en France qui a vraiment saisie ces enjeux actuels?

Plusieurs marques ont su comprendre les nouveaux enjeux et c'est même toute une région : La Champagne. Je pense que les maisons de Champagne sont le meilleur exemple.

Sur un plan concret, comparons le salon des vignerons indépendants et celui du grand tasting au carrousel du Louvre.

Au grand tasting déjà, il n'y pas d'avant. On s'y rend simplement pour observer, découvrir et déguster.

Autre point très important, on se repère dans le salon en fonction des noms de marque. Par exemple: le stand du Champagne Taitinger avec le logo et le slogan qui prédomine « L'instant Taitinger ».

Au salon des vignerons indépendants, on passe d'un univers à l'autre car là bas on se repère en fonction de l'appellation et pas en fonction du nom du vigneron. Cela paraît logique car historiquement les vignerons se sont beaucoup rassemblés en syndicats et en fédération professionnelle. Ils ont toujours appris à communiquer collectivement (les AOP sont des marques collectives). Un problème: leurs marques individuelles ont disparues.

Il faut donc réinverser cette tendance et parler d'une marque individuelle.

La Champagne a réussi à défendre activement l'appellation et en même temps le négoce a su créer des marques fortes et individuelles. Il s'agit ici d'une vraie collaboration entre négoce et vignerons. Contrairement à ce qu'on peut voir à Bordeaux. Il n'y a pas cette crainte et cette vision péjorative

du négoce. La conclusion est que le négoce champenois est là pour tirer la Champagne vers le haut et il le fait très bien en mettant en avant ses marques individuelles.

C'est là que nous pouvons émettre un bémol sur l'opposition « Ancien monde » et « Nouveau monde ». Les attentes sont différentes selon le pays et certaines tendances ont été comprises par l'ancien monde, comme par exemple en France avec la Champagne. Mais il faut prendre en compte qu'en France, la perception de la marque reste encore instable et incertaine.

Interview 2: Pierre-Alexis Mengual - Chef Sommelier Exécutif au Chateau l'Hospitalet (Gérard Bertrand), vainqueur du Ruinart Sommelier Challenge 2022 et élu meilleur Sommelier de Bordeaux 2021.

Bonjour Pierre-Alexis, une très grande partie de tes missions sont dans le cadre de la restauration et tu réalises beaucoup de prestations que ce soit au Clos du Temple ou durant des masterclasses, ou encore au restaurant 5 étoiles « l'Art de Vivre » au Chateau L'Hospitalet. Tu es donc quotidiennement au contact de nombreux consommateurs. J'aimerais donc commencer par te poser des questions sur leurs habitudes...

-As-tu observé une évolution dans les habitudes du consommateur ces derniers temps ? Si oui, quelles sont celles que tu as le plus observées?

Les habitudes évoluent tout le temps, parfois géographiquement et où des trends plus globaux. Ces derniers temps j'ai pu observé une certaine conscience des problèmes de santé liés à l'alcool et la recherche de boissons non alcoolisées, moins alcoolisées ou encore bien être. Les gens font plus attention et demandent à avoir possible un choix de modération.

-Pourquoi penses-tu que les habitudes de consommation changent?

C'est très complexe. Ça peut venir d'un influenceur comme un clip de rap ou une vidéo tik tok, ou le fruit de législation(alcool au volant) ou bien même plus indirectement les traités économiques qui rendent plus abordables certains produits. Il y a évidemment une influence du cinema.

-Quelle est la meilleure façon de s'adapter à ce changement? Que proposes-tu au sein de l'Hospitalet pour faire face à ces changements? Peux-tu donner des exemples?

La meilleure façon de s'adapter et d'avoir de la souplesse et se conditionner à concevoir des produits que les consommateurs veulent, ils sont les seuls juges ! Nous pratiquons des infusions de plantes, avons développé une gamme de sans alcool tout en restant sur des boissons complexes et en accord avec des plats. Nous offrons des cocktails de bienvenus sans alcool.

-Penses-tu que les attentes sont différentes selon la nationalité du client? Si oui, qu'as tu observé? Les américains ne jurent en ce moment que pour les sauvignons blancs, les chinois aiment les vins rouges toniques complexes. Les cultures influencent les consommations. Aux US proche du Mexique, la tequila est LA boisson alors qu'en Europe c'est peu connu.

-Selon toi, la "globalization" a-t-elle eu un impact sur les tendances/habitudes de consommation des consommateurs?

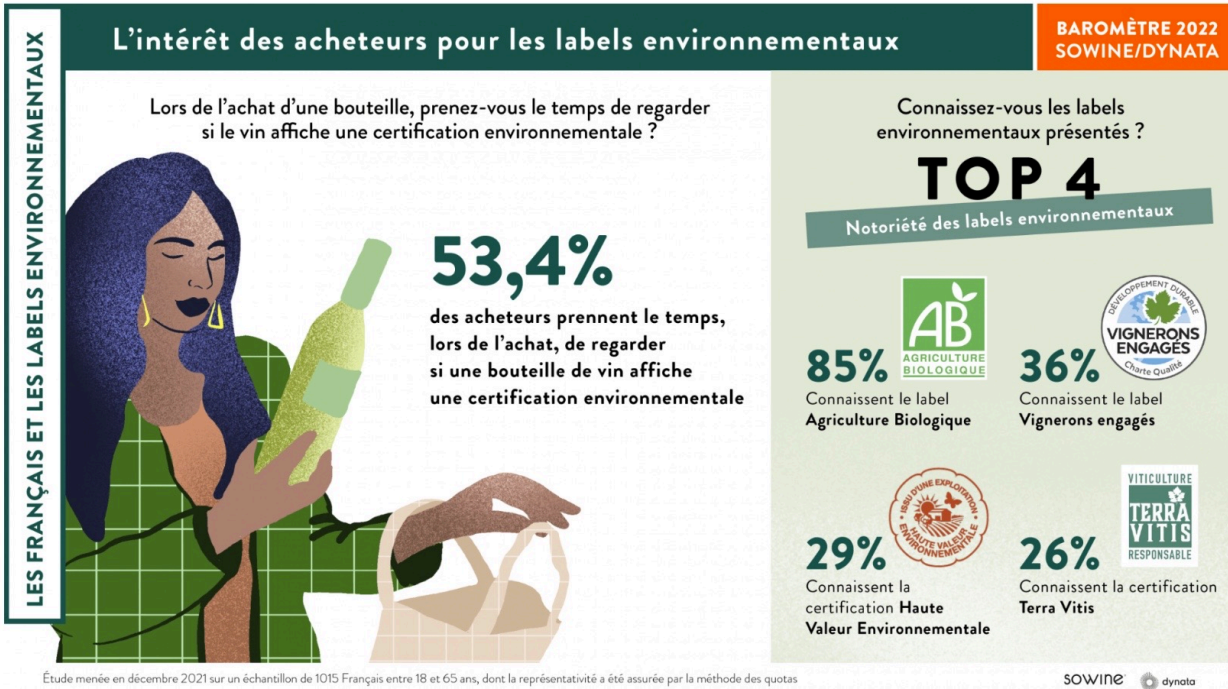
Elle a un impact mais ce n'est pas majeur, la culture de civilisation ou de pays est plus forte.

*-Quelles sont les innovations récentes dans le vin (ou spirits) qui t'ont le plus marqués? Qu'as-tu le plus aimé? Les vins oranges et leur saveurs spéciales, les levures tanins, la salinité et l'imam.
Surprenant !*

-Y-a-t-il une approche que tu trouves particulièrement pertinentes dans le groupe Gérard Bertrand (en terme de stratégie marketing) être innovant et déceler les prochaines tendances comme l'exemple du vin orange ou tout montre qu'on sera n.1 du secteur

PART 2:

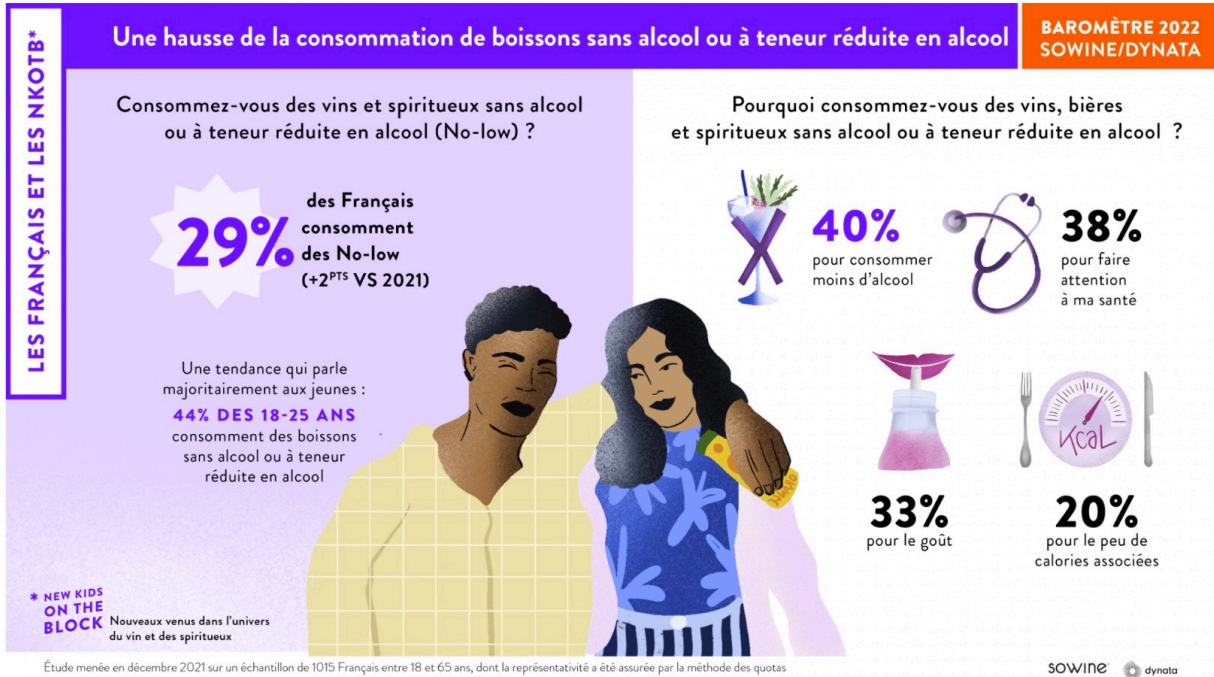
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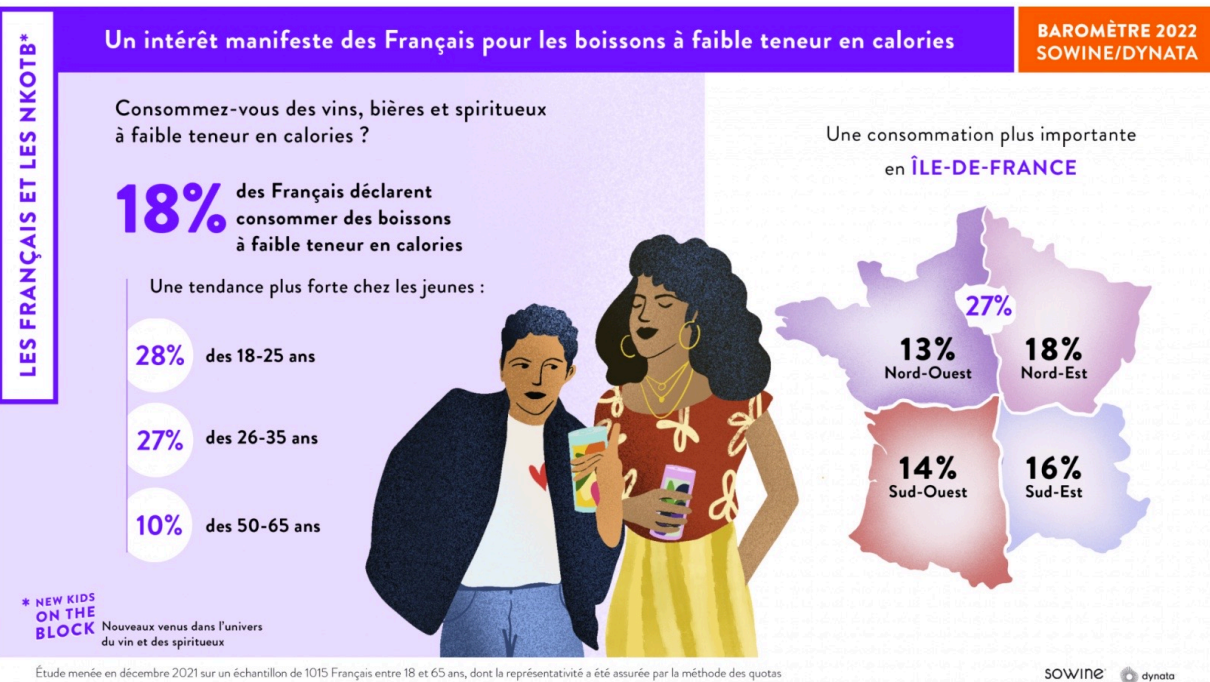
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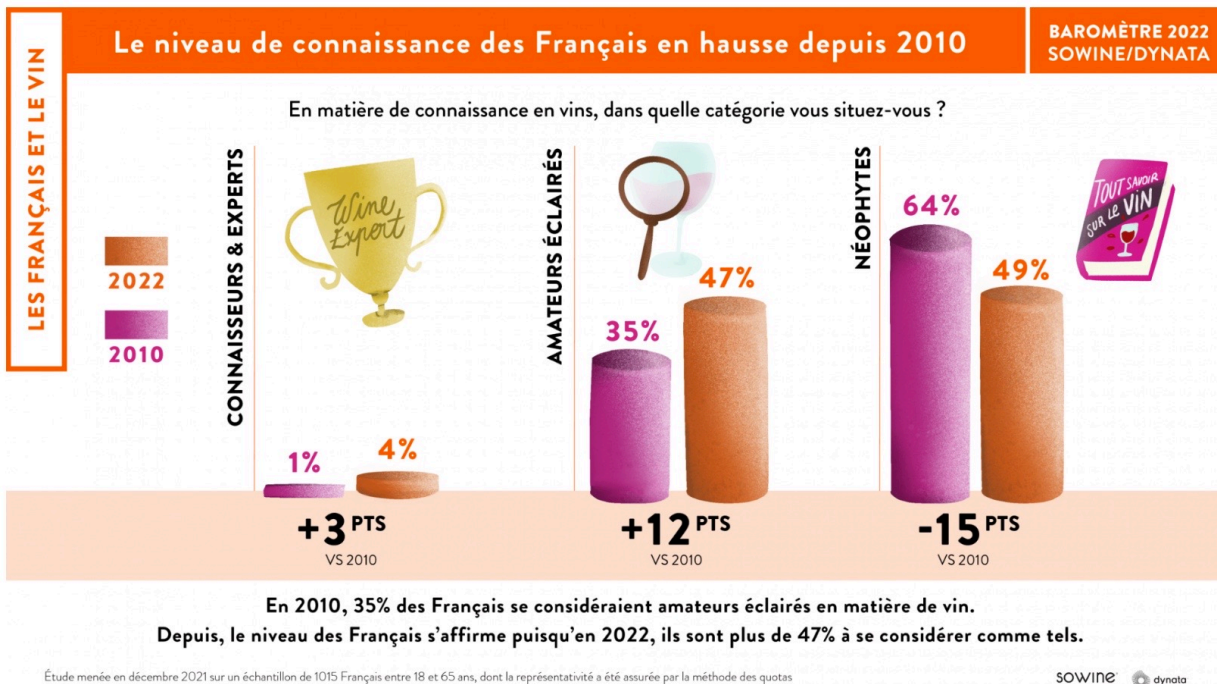
Appendix 2



Appendix 3



Appendix 4



Appendix 5

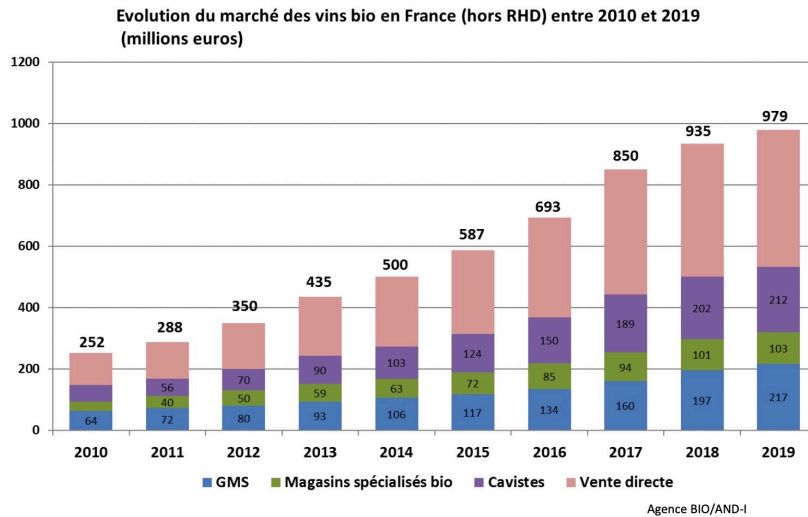


Appendix 6



Les achats de vins bio par les ménages pour la consommation à domicile en France par circuit (hors RHD)

- Quasi-quadruplement du marché du vin bio entre 2010 et 2019



Mardi 26 janvier 2021

Appendix 7

Les achats de vins recommandés par influenceur

BAROMÈTRE 2022
SOWINE/DYNATA

23% des Français suivant des comptes d'influenceurs ont acheté un vin recommandé (-5PTS VS 2021)

Une tendance plus forte chez les jeunes, mais en baisse :

39% des 18-25 ans
-6PTS VS 2021

35% des 26-35 ans
-1PT VS 2021



50% des grands acheteurs de vin ont acheté du vin recommandé sur les réseaux sociaux qu'ils suivent
-3PTS VS 2021



66% des grands acheteurs en ligne ont acheté du vin recommandé sur les réseaux sociaux qu'ils suivent
= 2021



32% Instagram est la plateforme la plus engageante dans le secteur des vins et spiritueux : 32% des utilisateurs d'Instagram y suivent des domaines, châteaux, marques ou producteurs de vin
= 2021

Étude menée en décembre 2021 sur un échantillon de 1015 Français entre 18 et 65 ans, dont la représentativité a été assurée par la méthode des quotas

SOWINE dynata

Appendix 8: Dom Pérignon Moodboard

*The Moodboard
Dom Pérignon's style...*



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PODCAST

Le podcast pour les Vignerons - Juliette Bory

5 Things Nobody Tells You About Ordering Wine in a Restaurant

STORIES & LIFESTYLE



Top 5 Tips on how to order wine at a Restaurant -----
----- There comes a time in everyone's life where, all of a sudden, you find yourself at a fancy restaurant. Maybe it's an expensive first date or you're celebrating something special... Or maybe you just think

TOP 5 TIPS ON HOW TO ORDER WINE AT A RESTAURANT

There comes a time in everyone's life where, all of a sudden, you find yourself at a fancy restaurant.

Maybe it's an expensive first date or you're celebrating something special... Or maybe you just think 'stuff it', I want to know what all the fuss is about.

For me, it was back when I was 22. I was six months out of uni and starting a role as a business analyst at a finance firm. I still remember it clearly because I messed it up royally. It went something like this...



I sit down.

Small talk, small talk...

There's a lot of fancy forks, spoons and, um, 'things' in front of me. What am I meant to do with them all?

Quick, think back to The Titanic. What did that nice rich lady say to Leo? Oh that's right, for cutlery, start on the outside and work your way in. Okay feeling good, this isn't so tough...

Okay, that's cutlery sorted.... Shit! Now they're serving wine.

This is all pretty nerve-racking... I don't want to look nervous. I know, a big gulp of wine will sort me out. This glass is pretty close to me; it must be mine.

I take a sip.

Ok, that's better. We're back on track.

UH OH!

I drank from the wrong wine glass!

Kill me now.

I can tell it was the wrong one because a vice president from my firm, who's sitting next to me, is staring at me and looks shocked. He just saw that I drank out of his glass.

Oh god! He's going to humiliate me on my first ever business-lunch.

But he doesn't say a word.

He's realised that I don't know what I'm doing, and as subtly as that evil guy in the *Princess Bride* movie, he swaps around our glasses without any of the clients noticing.

Humiliation avoided and he's just made me a fan of his for life. For the rest of the lunch I stick to watching him, and I manage to get through it without getting fired.

Okay, so my first time was a bit dramatic. And most places are pretty understanding if you don't know all the formalities and etiquette involved in fine dining.

The good news is, it's all about manners – so it would be pretty rude to call you out.

But, it's still nice to know what the rules are so that you can totally boss your next fancy restaurant situation.

So in that vein let's go through a few of the most confusing rituals of fine dining when it comes to wine.

WHICH BREAD AND WHICH DRINKS ARE YOURS?

Bread to the left and drinks to the right. Easy right? Actually, that's pretty tough to remember in the heat of battle.

Here's a trick.

Form the 'Okay' sign with both hands. (touch your thumb and your pointing finger together). Now look at your hands. They should look something like this 'b d'

Your left hand should be forming the shape of a 'b' for bread. And your right hand should be forming a 'd' for drinks. Easy peasy... onto the next pickle.

WHY ARE THEY SHOWING ME THE BOTTLE?

I guess this became a tradition back in the day when you would choose a nice expensive bottle of wine and they would do the old switcheroo and serve you the cheap swill without you realising it.

So the waiter is showing you that they have the bottle you ordered and that they aren't pulling the wool over your eyes. Mistakes do happen though, especially if the restaurant is really busy. So it's best to make sure that they do indeed have the correct bottle.

If it's a very expensive bottle, and you're not the trusting type, you may want to look at it a little more closely to see what kind of condition the cork and seal are in. You want to make sure that they're not re-filling expensive bottles with the cheaper stuff. This is going to be more common when you're travelling overseas and the locals reckon they can take advantage of the gullible english speaking tourists.

If you think there may be a chance that there is some funny business going on, make sure you take a look at the cork to see if it has the same label as the wine producer.

They should also open the bottle and pour your wine in front of you for the same reason.

WHY HAVE THEY GIVEN ME THE CORK?

Straight up; the cork is for looking and not smelling.

You see the purpose of a cork is to stop any air from getting to the wine after it has been bottled. Exposure to air causes it to **oxidate** and ruin the wine. Sad times.

It's your job to look at the cork and see if it has done its job in stopping air from getting to the wine.

So what are the signs the cork hasn't done its job?

1) There are veins of wine running through a large portion of the cork.

2) A large portion of the cork is soaked through with wine.

The official term for this is seepage. But even if the cork has seepage, it doesn't mean the wine definitely has a fault; there's just more chance of it. So pay more attention to the next point...

WHY HAVE THEY POURED ME A LITTLE AMOUNT OF WINE TO TASTE?

This isn't so you can taste the wine and tell the waiter if you like it or not. It's so you can check if the wine has any faults before he serves it to everyone.

So there's a quite a bit of pressure on you not to mess this up!

Just kidding, the chance that there is a fault is pretty low, especially with screw caps these days.

The three big faults to look for are:

Oxidisation

This happens when the wine in the bottle is exposed to too much oxygen. You know how copper statues turn green because of their exposure to oxygen over time?... Well, wine has a similar problem. Too much oxygen can interact with the compounds in wines, making them taste like vinegar.

This is the easiest fault to tell, as it will taste a lot like the **balsamic vinegar** that you dip your free bread into. The wine will also be a browner colour than you're used to seeing.

This normally happens because there was a problem with the cork and the sealing of the bottle. It's rare to find this fault with screw cap bottles, and this is one of the main reasons why screw caps were invented... so they wouldn't have to throw away ~1% of all bottles.

But many wine producers, especially those from Europe like to stick to their traditions and aren't going to be using screw caps any time soon.

Corked wine

Contrary to popular belief this isn't when the person sealing the bottle stuffs up and bits of the cork float around in the bottle. Little bits of cork floating around is easily fixed, but **'corked wine'**, not so much.

It's caused by a common bacteria that can sometimes be found on corks. It isn't harmful but it interacts with the wine to give it a strong musty smell. The wine itself may still taste okay, but because smell and taste are so closely linked, unless you have a musty smell fetish, it's probably going to ruin the bottle for you.

If it smells like wet socks, it's probably corked. Not sure? Ask the waiter or the sommelier to smell the wine. Most waiters in upmarket restaurants should know what to smell for.

Cooked wine

You know how you shouldn't leave children or dogs unattended in the car? Well the same goes for wine. When the wine is exposed to temperatures of over 30 degrees Celsius it 'cooks' the wine!

Direct sunlight on the bottle is often the culprit, which can be a problem in our climate. But don't worry, most wine transport companies and restaurants know how to transport and store their wines.

You might notice something is up when the wine smells sweet when it should be completely dry (no sugar in it). The wine will also taste flavourless; like someone has reached into the bottle and stolen all the yummy stuff, leaving behind a wine that packs no punch.

So now that you can tell the three most common faults...

WHAT DO YOU DO IF YOU THINK THE WINE HAS A FAULT?

So now that you can tell the three most common faults, what do you do if you think the wine has a fault?

This may take a bit of nerve... But if you're confident the wine has a fault, then you have to straight up tell the waiter. It's better than making your whole party drink an 'off wine'.

I mean you were wearing the big pants when you stepped up and offered to taste the wine, and what did you think? With great power, comes great responsibility!

You now have a duty to protect your fellow diners from drinking faulty wine. You're not the hero your dinner party deserves, but you're the one it needs!

Okay, enough superhero quotes. Serious time. How do you handle this?

Firstly, don't tell the waiter you don't like it. Tell him that you think the wine has a fault. If you are confident of which fault it is, say why you think it is faulty. Otherwise, you can just ask your waiter if they would mind tasting it to double check.

What should the waiter do? If he or she is good at their job, then they'll make you feel as comfortable as possible about this act of bravery.

It's on them to handle the situation well. And that's the sign of good hospitality. If they are dicks about it, then give them a crappy tip.

Then they should take it away and taste it or give it to their sommelier to taste. Sometimes the smell of the first sip can be a bit misleading, and if they are confident the wine tastes as it should, they will come back and explain this to you.

They may offer to replace it with a different bottle anyway and in this case, it's up to you to trust their opinion or take them up on their offer.

If there is a fault, then you just saved your party's night. Boom!

The restaurant should take this chance to use the wine to train their staff to identify that particular fault.

And there you have it five tips for understanding fancy restaurant dining etiquette when it comes to wine. You now have all the tools for nailing the wine etiquette at your next fancy dinner.

But wait, what about choosing a good wine?

That's a whole other barrel of corks. We'll be sharing our guide to this very soon, but in the meantime check out our Wine Palate tool to find your favourite three types of wine. Cheers!

Next up: Take our Wine Palate Quiz and match your personal tastes to your top three wine types

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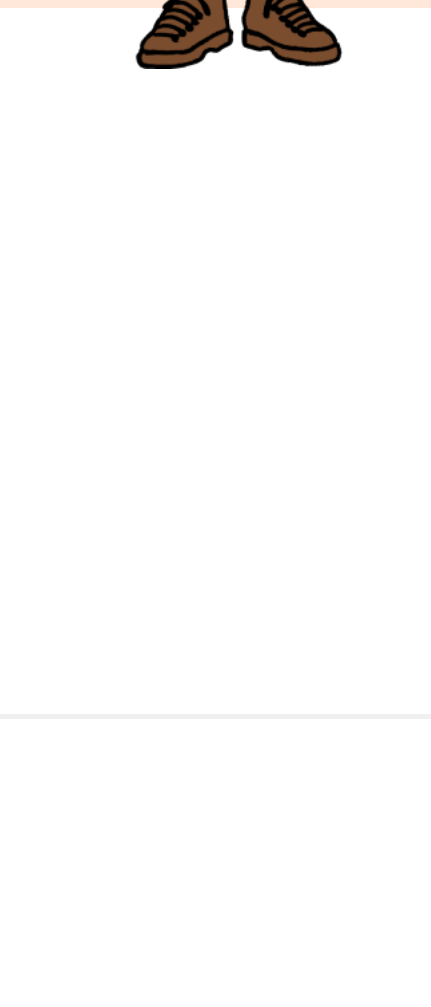
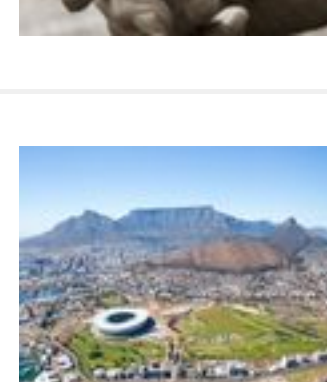
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