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samit chakravorti

Western Illinois University, s-chakravorti@wiu.edu

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# **Wine Consumer Culture Positioning: Case of the Global Success of Yellow Tail and Casillero Del Diablo**

**Samit Chakravorti**

*Western Illinois University*

## **ABSTRACT**

*This paper qualitatively discusses through the lens of consumer cultural positioning literature the global success of two wine brands: Yellow Tail of Casella Wines of Australia and Casillero del Diablo of Concha Y Toro of Chile. These two brands have made meaningful gains in many markets across the globe despite the high fragmentation in the world of wine and have made themselves stand out as icons of “global” brands in the wine world. Analysis of secondary data reveals that the marketing actions of the two brands align with findings from branding literature. Both brands identified different but meaningful consumer cultural trends of wine consumption across the world and positioned themselves as symbols of the same through their marketing operations. They were able to successfully position themselves as foreign brands with a global and local appeal.*

## **INTRODUCTION**

Global wine consumption has seen a sharp increase in the last decade. However rise in wine consumption per individual has been much more modest (Globe News Wire, 2020). This could be explained by decrease in awareness of wine brands in the last couple of years (wineintelligence.com, 2019). Low awareness could be a reflection of the degree to which consumers find promotional styles and messages from wine brands very similar, complicated, and thus not helpful in decision making. This lowers the overall attractiveness of the wine as a product vis a vis other alcoholic beverages.

Wine promotion commonly highlights country of origin, complexity of flavors and enological terminologies such as vintage and terroir. These are intended to raise the perception of wine as a sophisticated and special product. Such promotion assumes a certain level of awareness and knowledge on the part of the consumer. A large number of consumers across the world lack this awareness and knowledge (Mohammed, n.d.). Despite the good intentions of wine brands in making an effort in educating consumers, such type of promotions tend to increase intimidation and frustration in current and potential wine consumers in their purchase decision making process (Sbranti, 2008; Kim and Mauborgne, 2015). This negative impact is made worse by the crowdedness of the wine industry with hundreds of wine brands jostling for space and attention and most saying almost the same things.

Unlike beer and liquor, the wine world does not have a typical global brand that has a significant percentage of global sales. Explanation may lie in the fragmentation in the wine world with a large number of wine brands, origin boundedness, lack of a consistency in quality from year to year given the vagaries of nature and the perception of the product category. The last is a direct

consequence of the style and type of promotion discussed above and is the only factor that is under control of the brand. Given these realities it almost seems it would not be possible to develop a global wine brand. However in the last few years a small number wine brands have shown consistent and substantial increase in global reach and global sales. These are the Yellow Tail Brand from Casella Wines of Australia, Casillero De Diablo brand of Concha Y Toro of Chile and Gallo brand from Gallo wines of California. These have been ranked the top 3 most powerful wine brands in the world by wine analyst wine intelligence (Arthur, 2020). The rankings are determined from wine consumer surveys from across the world and is based on awareness, purchase, conversion, consideration, affinity and recommendations.

Based on the measures used to rank the wine brands it is clear that global success in sales comes through a combination of creating awareness and developing a connection to the consumer both cognitively and emotionally to the extent that they not only become repeat buyers but also become word of mouth promoters of the brand. Essentially it refers to how and how well the brand is positioned. This sometimes requires the support of alliances with other entities such social institutions, and retailers that enhance the appeal of the brand and make it adequately available for purchase. Global distribution and retailing need support of a convincing and differentiated positioning to increase and sustain global sales especially in a fragmented market.

Given the rapid rise in global sales in the top 2 brands mentioned above despite the fragmentation in the wine world it would be educational to analyze their positioning strategies that have increased the attractiveness of their brands worldwide. This paper thus discusses the different strategies and tactics Yellow Tail of Casella Wines from Australia and Casillero Del Diablo of Concha Y Toro of Chile have utilized to improve their global brand standing particularly with regards to the positioning strategies followed by these brands and alliances made to complement these positioning and marketing of the wines. This discussion should serve as a learning resource for other wine brands. It should also help academia to further explore and develop robust theories about positioning in the global wine world and the feasibility of a global wine brand.

The paper is broken down into several sections. The next section discusses findings from literature on international brand positioning and global branding. This is followed by information on evolving global consumer behavior aspects of wine. Analysis of operations of the 2 wine brands is discussed next to get an understanding of the type of positioning and other marketing efforts that resulted in the continuing success of the brands globally and if these brands can be considered global brands. The paper ends with implications for industry and academia.

## **CONSUMER CULTURE POSITIONING AND BRAND PERCEPTIONS**

In order to position their brands in international markets marketers commonly use a global, foreign or local consumer culture positioning strategy. A global consumer culture positioning strategy (GCCP) connects the brand to a global consumer culture to signal it as a symbol of a cultural pattern (Alden et al., 1999). Foreign consumer culture positioning (FCCP) and local consumer culture positioning (LCCP) strategies on the other hand tie the brand to either foreign or local cultural traditions, norms, meanings, people and geography, signaling brand foreignness and brand localness respectively.

The appropriateness of global, foreign or a local consumer culture positioning across international markets depends on the existence of particular relevant consumer cultures and the extent of similarities and differences in these indicating the extent of consumers' intentions to global, foreign or local brands. For example, Brazilian customers evaluate global brands higher compared to Argentinians and Mexicans (Merino & Gonzalez, 2008). Product category and competition also impact the feasibility of utilizing a particular type of consumer culture positioning. Consumers in Turkey prefer local banks (Pinar et al., 2012) and Starbucks uses global positioning in some markets and local positioning in others (Patterson et al., 2010). Aspects of culture such as values, language, aesthetics, symbolism, and story themes impact consumers' intentions to perceive and buy into one kind of consumer culture positioning versus another (Alden et al. 1999; Dogerlioglu-Demir and Tansuhaj, 2011). Thus in communicating positioning of a brand in global markets using consumer culture, marketers use specific indicators as symbols (e.g. language and logo), spelling and pronunciation of brand name, central themes and spokesperson.

With globalization of trade and stronger economic development, some of these consumer culture aspects have become more similar across countries (Hassan and Katsanis, 1994; Holt, Quelch, and Taylor 2004). Global recognition of celebrity spokespeople, global spread of the English language, symbols of modern urban lifestyle, and story themes that reflect aspects of this lifestyle are a few examples. These increasing similarities have also had the effect of increasing world mindedness and cultural openness (Nijssen and Douglas, 2011). Batra et al. (2017) identified three positive life values (benevolence, universalism and self direction) that are common across a large set of countries and connected these values to common positive brand image attributes (friendly, social and original) that are important to consumers across these countries. The drivers for this connection lies in well researched psychological forces such as satisfaction with life, relevance of the brand, brand as a conduit to self image projection, desire for novelty and stimulation and connections to reference groups. These changes have facilitated usage of GCCP (Nijssen and Douglas, 2011). GCCP has been shown to have a positive impact on attractiveness of source and brand image (Heinberg, Ozkaya and Taube, 2017). Young urban Chinese and Indians that identify with global consumer culture and global citizenship (modern thinking, living and interacting) have a positive attitude towards brands using GCCP (Gammoh, Koh and Okoroafo, 2011; Lysonski, 2014).

Despite the increasing feasibility of GCCP considerable differences in consumer culture still exist from country to country. This difference is particularly significant between developed and emerging markets (Wright et al., 2005; Burgess & Steenkamp, 2006). This makes GCCP less feasible. To go around this problem but still standardize their positioning globally companies can engage in FCCP. This can be particularly effective for some product categories where association of the product with a country or culture may convey perceptual benefits (Meese et al. 2019). A French sounding (vs a English sounding) name for a hedonic product such as fragrances creates a more positive perception (Leclerc et al. 1994). Origin bound products such as wine, cheese and coffee have a stronger reason for using FCCP strategy.

Research highlights several best practices for effective GCCP or FCCP. To project a brand as global or foreign it is best to retain the original brand name or a translated name with original pronunciation, create a global or foreign brand meaning, stress more on the symbolic than

utilitarian aspects of the brand, and provide a westernized appeal (Li et al. 2011). The last is particularly relevant in developing countries where western brands are associated with cosmopolitanism and status. Ads using GCCP tends to showcase the brand using more image oriented and abstract “soft-sell” techniques compared to more informational and product feature oriented “hard-sell” approach (Alden et al. 1999).

Effectiveness of a particular consumer culture positioning is contingent upon consumers perceiving it as such (Holt et al. 2004; Alden et al. 2006). Perception is impacted both by country level cultural values and personality traits, creating differential impacts of a consumer culture positioning. Brand perception comes through exposure to media and promotions (Steenkamp et al. 2003). Promotion creates a social identity around brands. They are thus considered like social entities and hence evaluated like other social actors by seeing them through the lens of a superordinate category such as global, foreign, or local (Davvetas and Halkias, 2019). This happens through cognitive and affective pathways. Some overarching similarities across countries have been found. Some consumers across countries have a desire and tendency to acquire and use global brands leading to effectiveness of GCCP or FCCP (Zhou et al. 2008). Where global brands are perceived as high quality and prestigious local brands are perceived as prestigious but not high quality. Both positioning are positively associated with purchase likelihood. The consumers attracted to global appeals associate ad meanings with beauty, status, cosmopolitanism and competence whereas consumers attracted to local appeals associate ad meanings with nationalism, local cultural values and warmth (Davvetas and Halkias, 2019; Hussein and Hassan, 2018; Zhou and Belk 2004). At the same time in some case despite a global standardized positioning consumers in different countries perceive the same brand having separate personalities (Foscht et al. 2008). Some brand personality such as “friendly” has been found to be equally salient across cultures but other personalities are seen in a positive light in some cultures and not so in others (Nijssen and Douglas, 2011). The meaning and relevance varies reflecting differences in country level values and personality traits. McDonald’s sign and it’s “I am loving it” appeal maybe globally consistent, however the execution of the concept and appeal is done with local cultural patterns in mind (Kates and Goh, 2003).

Country of Origin (COO) has been shown to impact consumer perception of brands through evaluations of country image and country brand equity (Pappu et al., 2007; Zeugner-Roth et al., 2008). These evaluations are tied to the country’s political, legal, economic and cultural perceptions, to experiences the consumer has had of products from the country, as well as how media promotes the brand (Fetscherin, 2010; Godey et al., 2012; Aichner, 2014). The impact of COO is strongest when the consumer has limited information about the product available for decision making (Lim et al., 1994; Pharr, 2005). Impact of COO perceptions vary across countries with developed countries showing a positive bias towards domestic products because of ethnocentrism (Verlegh, 2007; Michaelis et al., 2008) but developing countries showing a positive bias towards foreign products which are deemed higher quality and prestigious (Dakin and Carter, 2010). This is also true for wine (Chaturvedi, 2017). Thus where ethnocentrism in developed countries is of significance in evaluating brands across all types of positioning, cultural openness is of significance in developing countries (Gammoh, Koh, and Okoroafo, 2020). COO impacts have also been shown to vary across product categories and relevance and self-identification with the brand. (Josiasen et al., 2008; Lin and Wang, 2016). This makes COO effects relevant to origin bound products in general such as coffee and cheese and

particularly for socially complex origin bound products such as wine. To take advantage of COO effects, brands in such product categories can effectively utilize a GCCP or FCCP strategy.

Along with cultural openness, globalization has also spawned nationalism and ethnocentrism across countries with greater prominence of ethnocentrism in developed countries and cultural openness in developing countries (Gommoh, Koh, and Okoroafo, 2020; Nijssen and Douglas, 2011). These opposing forces also vary across product categories and changes overtime (Liu, Tao, and Tsai, 2017). To take advantage of this consumer phenomenon many globally operating companies have started associating local cultural experience with their brands within an overall umbrella of either a GCCP or FCCP strategy (Eren-Erdogmus and Dirsehan, 2017). These companies establish a combined appeal of global or foreign mixed with local consumer culture positioning by providing a global offer (idea, brand, product, service) but adopting local issues and sensibilities (Keegan & Green, 2013). This is usually the case when competitors face competitive heterogeneity across markets and thus have to adapt their positioning from one market to another to develop a positive attitude towards their brands (Batra et al. 2017; Saimee and Roth 1992). Globally positioned brands with local appeals makes the brand more relevant to local consumers providing a competitive advantage (Hsieh and Lindridge, 2005; Zhou and Belk, 2004). Even ethnocentric consumers are positively oriented towards foreign brands which have created localized appeal by adopting local traditions and contributing to local society's well-being (Kipnis et al. 2012). Local positioning have also been shown to increase buying impulsivity by lowering the psychological distance between the consumer and the brand making the immediate and concrete attributes more salient (DeVries and Fennis, 2020). This hybrid approach of lacing GCCP or FCCP with localization should also be effective for origin bound products such as wine, coffee and cheese than a pure GCCP or FCCP strategy. This can be done through the usage of language in labelling, advertising appeal, brand name and imagery (Liu, Li, & Murphy, 2008; Verlegh, Steenkamp, & Meulenberg, 2005; Zhang & Schmitt, 2001; Mikhailitchenko et al., 2009).

## **GLOBAL BRAND**

An integrative approach considers a brand “global” if it meets multiple criteria. A “global” brand has 1) global reach in terms of distribution, sales and marketing, 2) standardization of product features such as brand name and packaging and other marketing operations, and 3) a uniform global perception by consumers worldwide (Mandler, 2019). The last is commonly achieved by utilizing a global consumer culture positioning (GCCP) targeted at followers of a global consumer culture even though despite such a concerted effort consumers in different countries may still perceive a brand differently (Holt et al., 2004; Steenkampf et al., 2003; Saimee, 2019; Strizhakova et al., 2008; Taylor and Okazaki, 2015). A brand following FCCP can also achieve a “global” brand status since it can feasibly meet all the needed criteria for a “global” brand creating a standardized foreign perception instead of a standardized global one (Alden et al. 1999).

The impact of perceived globalness on brand evaluation and attitude is not uniformly positive when broken down into component effects. Where perceived market reach (PMR) has a universal positive impact, perceived standardization (PST) has a strong negative effect (Mandler 2019). The latter can be toned down by localization efforts as discussed above. Riefler (2020) recommends highlighting brand authenticity to overcome this negative effect of perceived brand

standardization and to compete better with local brands. An authentic brand is rooted in history, tradition and heritage and is perceived as real, sincere and motivated by genuine passion (Beverland et al. 2008; Gilmore and Pine, 2007)

In sum research shows that the effectiveness of a certain consumer culture positioning strategy depends upon consumers targeted with that positioning also perceiving it as so. Beyond this, companies marketing origin bound brands in multiple countries need to understand which brand personality constitutes globalness, or foreignness because this may vary from country to country. Consumers across countries also react more or less favorably to global or foreign brands. Consumers evaluate brands as social entities that involves both cognition and affect. Where global or foreign brands get more cognitive appreciation local brands are evaluated more emotionally. These complexities have thus motivated many companies towards a hybrid positioning strategy where pure global or foreign consumer culture positioning is balanced with local aspects. The overall brand value proposition and the brand recognition may remain global or foreign but particularities of the offering and some marketing operations are localized to maximize the attractiveness of the brand.

## **GLOBAL WINE CONSUMER CULTURE**

Consumer culture positioning research states that brands wanting to utilize a certain consumer culture positioning have to first find consumer cultures that span the globe around which the brand can be positioned. Then they have to successfully create a perception in global consumers' minds that their brand is a symbol of such a culture. A brand becomes a symbol through carefully connecting with consumers both cognitively and emotionally. A brand that is present across the globe is foreign to most countries to start with but overtime could take on a more global and/or local image based on marketing actions the brand has taken. So depending on the consumer culture the brand can decide to position itself as foreign brand that plugs into a global consumer culture or a global brand with no obvious connection to the home country. Given that wine is an origin bound product an association with origin cannot be avoided and needs to be incorporated into the positioning. Thus a wine brand that wants to be successful globally will likely need to engage in a foreign consumer culture positioning where the brand connects to a global consumer culture as a foreign brand. Literature also states that many companies realizing the emerging dual forces of cultural openness and ethnocentrism across countries have found it effective to blend their global or foreign consumer culture positioning with local adaptations.

Wine Intelligence 2019 and 2020 reports on global wine trends (Halstead, 2020) highlight several global cultural trends surrounding wine consumption. This is based on 21,000 wine consumer surveys across 21 countries. Along with increasing consumption of wine across countries consumers are also more involved in wine consumption. However surprisingly consumers are also increasingly less knowledgeable about wine. The lack of knowledge may be explained by the way wine is traditionally presented both in advertisements and in packaging where information provided is of a technical nature and there is an expectation from consumers to be able to grasp and appreciate the same. This type of information provision tends to frustrate consumers of wine and turn off potential consumers of wine. This particularly contrasts with advertisements of beer, cocktail and liquor which are made in a more approachable style. The increasing involvement but lack of knowledge of wine would be particularly evident across many developing countries where the wine consumption culture is newly taking root

(Chaturvedi, 2017). To take advantage of one trend and take care of the other it is imperative of wine marketers to grab consumer's attention through promotion and provide them information that is easy to understand. Higher involvement with wine is also making wine a part of life and lifestyle and consumers across the world want to make consuming wine both on-premise and at home a memorable experience whether it be an any day or a special day consumption. This increasing adoption of wine has also brought about a switching behavior across alcoholic beverage categories. The days of pure wine or beer guys are slowly disappearing. The more intimate adoption of wine as part of life has also had a dual effect where generally price conscious consumers are willing to pay higher prices for brands that stand out and make themselves attractive. Consumers across the world perceive wine an "expensive" and sophisticated product so as they seek value they are also willing to trade up. This increasing premiumization of wines has certainly helped wine revenues to grow faster. The pandemic has increased this speed of premiumization and the growth of wine sales and consumption. "consumers are trading up and spending more," (Sullivan, 2020).

The development of a global consumer culture of wine has the potential for wine marketers to create strong brands that will help differentiate the brand. Both Yellow Tail of Casella Wines of Australia and Casillero Del Diablo of Concha Y Toro wines from Chile have created brands that resonate with consumers across the world and they have done so in similar and different ways.

## **METHOD**

Articles and case studies on Yellow Tail and Casillero wine brand were searched both on google and databases such as ABI Inform and Business Source Elite by using search phrases that included various combinations of brand, branding, positioning, consumer culture, global, international operations, marketing, alcoholic beverage, drinks, Yellow tail, Casillero Del Diablo and Concho Y Toro. Relevant articles and case studies that discussed strategies, operations and marketing of the two brands were selected. Searches were also performed on youtube and google for commercials and print ads respectively for yellow tail and casillero del diablo. Contents of these were then analyzed in the light of findings from consumer culture positioning and branding literature to understand, explain and contrast the branding and positioning strategies of yellow tail and casillero del diablo.

## **YELLOW TAIL AND CASILLERO DEL DIABLO'S CONSUMER CULTURE POSITIONING**

Both Australia's Yellow Tail and Chile's Casillero Del Diablo wine brands have exponentially increased their sales across the world in the last decade by taking taken advantage of the global growth of the wine category (Annoymous, 2019). Yellow Tail and Casillero Del Diablo has also been ranked by Wine Intelligence as number 1 and 2 most powerful wine brands in the world in 2020 for the 3rd year in a row (Arthur 2020). Most notably these two brands overachieve in their brand power in relation to the size of wine production in these countries (wineintelligence.com 2019).

These two brands have been able to distinguish themselves from the large number of seemingly similar wine brands and rise above the fragmentation in the wine world to capture attention and wallets of consumers world wide. They have been able to do this by utilizing a positioning



strategies based on consumer culture of wine consumption that spans across multiple countries both western and eastern and developed and developing. Yellow Tail sells in over 50 countries (deutschfamily.com) and Casillero Del Diablo in 145 countries (Casillerodeldiablo.com).

Yellow Tail famously disrupted the wine world by finding a blue ocean space and developing a strategy around that (Kim and Mauborgne, 2015). A blue ocean strategy is a strategy based on unearthing a relevant opportunity in an open space in the market and creating a value proposition around that. These blue ocean spaces contain meaningful benefits and values which customers are consciously seeking or subconsciously desiring but which are also devoid of any offering from competitors making them blue ocean. Most competitors are usually competing head on in the bloody waters of the red ocean where everyone's offerings, value propositions are very similar. Whereas meaningful differentiation can be achieved through a blue ocean strategy there is little to no differentiation in a red ocean strategy (Kim and Mauborgne, 2004).

For Yellow Tail the blue ocean lied in evolving global consumer culture of wine consumption. Based on several phenomena in the global consumer wine world as discussed in the preceding paragraphs, Yellow Tail was able to create a brand new category within the culture of wine consumption. Worldwide consumers are growing more involved with wine and want to experience it as a regular part of their life. However they are frustrated by expectations of knowledge of wine and wine consumption that most wine brands have and which is reflected in their promotions and packaging which are filled with complex enological terms. Wine brands want to promote their wines as special products and expect consumers to develop a knowledge base around wine's complex technical features such as vintage, ageing and words associated with flavor profiles such as tannins. This results in very similar looking packaging and similar sounding promotions. This sense of being overwhelmed in choice is made worse by the high of degree of fragmentation in the wine world with hundreds of wine brands jostling for space in supermarket shelves and in restaurant lists. This is probably welcomed by a small percentage of knowledgeable wine drinkers but it results in discouraging regular wine drinkers or who would like to switch around their choice of alcoholic beverage for the eve or occasion. Contributing to this lack of switching is also the much more approachable promotion by beer and hard liquor brands. As a result the wine world does not expand as much because the type of promotion and labeling does not facilitate the switching across wine, beer and cocktail varieties and in turn does not aid in making wine a regular part of life and lifestyle. The consumption of wine never really expanded to include beer and cocktail drinkers and sales of wine brands tended to stagnate.

Yellow Tail took a completely different strategy based on this increasing involvement with wine but disillusionment and frustration of alcoholic beverage drinkers with wine promotion and turned wine into a social and approachable drink that you enjoy with friends and family whenever it takes your fancy. According to Kim and Mauborgne (2004) authors of the Blue Ocean Strategy book, Casella Wines approach to making and marketing Yellow Tail is captured aptly "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" Basically Yellow Tail was able to create a separate category by creating a completely different perception of the product. This was achieved through the four pillars of the Blue Ocean Strategy: Reduce, Eliminate, Create, and Raise. Closely following global consumer evolving trends the brand reduced complexity in the product by making it sweeter, fruity and easy to drink, and its range,

and eliminated complex enological terms in packaging and promotion (Marion 2014). What they created instead was ease of selection through their visually bright packaging with limited information and ease of consumption with a fun and adventurous image created through promotion. They raised their profile through their price positioning between the budget wines and premium wines and through their customer involvement in retail. They also took advantage of other aspects of global wine consumer culture. Customers across the world desire more visually appealing packages but they also consider the country of origin as an important factor in their wine selection. Yellow Tail's simplified packaging showing only the name of the grape, the type of wine and the country of origin but highly visualized with the iconic picture of a Wallaby not only helps their brand to stand out but also cement their connection to their country of origin, all facilitating consumer decision making. These made Yellow Tail attractive as a wine brand. Promotional materials utilized by Yellow Tail to support this positioning clearly showcases both the bottle with its stand out visuals with a connection to country of origin, and also the fun, adventurous, and casual personality of the brand through portrayal of multiple social scenarios where the bottle can be opened and shared for anything (Burns Group, 2011, 2010; Peak of the Net, 2017; The Star Ads, 2019). This value positioning and visuals in promotion was repeated across countries with slight variation in scenarios to connect emotionally with local consumers such as the superbowl ad for the US market (Alvin, 2010; Max Exim LLC Max Group, 2018; Peak of the Net, 2017).

Casillero del diablo of Concha y Toro Wines Chile took a more incremental but established route towards consumer culture positioning. They found a captivating story to tell about the brand that resonates with consumers across the world but which is steeped in its connection to Chile, the country of origin. They created the story of the Legend of the Devil's Cellar. To protect his wines from theft, Don Melchor, the original owner of Concha Y Toro created the story that the wines in his cellar are being guarded by the devil himself (CasilleroDiabloCyt, 2009). The legend spread and the easy comprehensibility and intrigue in the story resonated with increasingly involved customers worldwide. The universal theme of the story of the legend of the Devil associated with a brand with a name that means "The devil's cellar" with a picture of the devil on the bottle helped grab attention and stand out. It was however the emotional appeal of the story across the world that helped the brand to be successful worldwide. Positioning literature stress the importance of connecting with consumers at the emotional level because consumers evaluate brands as social actors. Casillero del diablo creatively connected it's story of the devil guarding the wines by utilizing cinematic storylines and dramatization in it's promotions of the brand that stayed very similar across countries (Casillero del Diablo, 2012, 2015, 2018; Casillero del Diablo Brasil, 2018). The brand also developed a strong emotional connection with global consumers by tying the devil and in turn the brand with particular qualities of toughness, irreverence and adventurousness that is particularly desirable in the eyes of young people around the world (Daf.agencyA, 2019). The brand folded worldwide consumers of the brand within the protection of the devil. In particular countries the brand strengthened it's position by localizing some of their strategies such as their sponsorship of Manchester United the well known soccer club in the UK, or the New Jersey Devil , the ice hockey team in New Jersey, US, and working with local retailers. The brand creatively touched both global and local with its association with Manchester United. Through aligning the long histories of the two brands, Casillero del diablo made an effort to create a exciting perception of alignment between the global recognition, fame and legacy of Manchester United and that of the devil himself (Casillero del Diablo, 2017;

Unitedpubru, 2011). This was designed to target not only the home grown fans of the club in UK but also fans across multiple countries particularly in Asia (Casillero del Diablo, 2013; Choi, 2013). The devil connection is always there in these global or local connections and promotions whether it features Halloween, sponsorship of the darkland drama series in Ireland or the knights in armor playing soccer with a ball emblazoned with the face of the devil (Annonymous2, 2019; Burd 2014; Movietrailertrash, 2013; Daf.agencyB, 2010; Dav Concept, 2017). This emotional connection was taken to an interactive level both in social media where a “nocheslegendarias” campaign was run to create brand awareness and preference. Consumers were asked to share their stories around casillero del diablo wine consumption for one to be stolen and chosen by the “devil” for a trip to chile (<http://erincardona.com/casillero-del-diablo>). Offline, to grab maximum global attention Casilleros set up tasting center in Changi International airport for its premium “route of the cabernet sauvignon” series of wine, complete with a “route of cabernet sauvignon” game to engage customer and the rustic metal and iron grill look in the set up to provide a “dark and exciting” demeanor (Ng, 2019). The brand carried it’s devil connection into its packaging by showing the devil front and center on its bottle and like Yellow Tail have no other information besides name, grape variety, year and country of origin. Despite the global appeal of the spirit of the devil’s legend story of the brand, by focusing on the origin of the story and packaging information clearly tied itself with it’s country of origin. These promotions beyond emotionally connecting with the consumers, also cognitively raised Casillero del Diablo’s profile as a provider of premium wine from Chile. Positioning literature stresses on the importance of doing both. Through its legend of the devil story campaigns, it’s packaging, and its tasting set up at Changi airport the brand has not only successfully created itself as a symbol of a global consumer culture of wine consumption but also effectively tied itself to Chile.

The strategies of both Yellow Tail and Casillero Del Diablo that targets global consumer culture trends to appeal to consumers worldwide have been successful. However the two companies have taken two different routes. Yellow Tail made itself stand out as an anytime wine for all social occasions appealing to the simplicity desired in wine choice by an evolving class of wine drinkers world wide who were frustrated with the complexity of wine choice and deterred by the technical promotions by wine brands. In this process Yellow Tail created a separate blue ocean category and perception surrounding wine consumption and utilized both strong cognitive and emotional appeals to consumers of all alcoholic beverages as a symbol of this category. Casillero Del Diablo on the other hand made a successful more emotional connection with global consumers with its Devil’s legend story and its associative elements. The two brands also seem to be are targeted towards different global wine consumers based on the kind of promotion and pricing strategy. Yellow Tail brand is targeted to casual wine drinkers and non-wine alcohol wine drinkers at a price point above the budget wines but below the \$10 ceiling beyond which lies the land of premium wines. Casillero Del Diablo on the other hand is targeted towards more discerning wine drinkers who tend to have more knowledge about wine on average relative to Yellow Tail target segment and is priced around the \$10+ premium wine category. The brand has also made an effort to go more premium with their Changi Airport promotions where the cabernet sauvignon wines promoted were between a price range of \$20 and \$80 range highlighting the impact of the aging process on wine quality (Ng, 2019). .

### ***Global or Foreign Brands?***

According to the integrated view, brands that have a global reach, are available in standardized packaging and in the same price range across multiple countries and utilize a consistent consumer cultural positioning across countries qualify as global brands. Both Yellow Tail and Casillero Del Diablo satisfy these criteria. Both Yellow Tail and Casillero del Diablo sell across the world, have standardized packaging and promote their brands by attaching them to global consumer culture trends. Does that make them global brands? Global brands frequently use a global consumer culture positioning. However if consistency of consumer culture positioning is key then a consistent foreign consumer culture positioning should also allow brands to claim themselves as global brands. Both Yellow Tail and Casillero have plugged into global consumer culture trends and made their brand symbols of different aspects of global consumer cultures at the same time tying themselves to their country of origin. This is unavoidable for an origin bounded product such as wine and where consumers give importance to country of origin. So both the brands use a foreign consumer culture positioning and are likely perceived as foreign brands who have maintained a standardized image by consistently catering to certain trends of global wine consumer culture trends and standardizing the look of their packaging and the information provided therein. Thus the brands have been successful to create perceptions of both foreignness in their roots but globalness in their appeal. Global brands also frequently localize at the level of operations to better connect with consumers within a country and thus a certain level of localization has become a mainstream aspect of global brands particularly in food and beverage industry. Both Yellow Tail and Casillero Del Diablo localized through alliances with local entities such as retailers and sports and entertainment entities. Through their unique value positioning the two brands have also achieved brand authenticity. Yellow Tail made wine approachable and Casillero Del Diablo wrapped their value around the legend, tradition and history of the devil tying that to local entities in different countries. Brand authenticity has been shown to counter the negative effect of brand standardization (Riefler, 2020)

## **PRACTICAL IMPLICATIONS**

The paper has implications for wine makers. Through the discussion of the positioning efforts of Yellow Tail and Casillero Del Diablo, the paper highlights successful and innovative strategies that can be utilized by other wine brands. Despite the fragmentation of brands and market share in the global wine market the paper highlights positioning strategies that have brought global success to these two brands. It also showcases the implementation of best practice positioning strategies highlighted by branding and marketing literature. To develop a clear positioning the two brands first followed marketing best practice of engaging in extensive research on not only consumers of wine but also of alcoholic beverages in general in an effort to understand the evolving trends of wine and alcohol consumption. This research helped Yellow Tail to find a blue ocean opportunity which they utilized to position their brand uniquely and creating a separate category of wine consumption. Casillero Del Diablo targeting a different target segment at a different price point from Yellow Tail also followed global branding best practice of building a symbolic brand story that will not only be globally understood but which also gives the brand a set of personality traits which consumers across the world found attractive and intriguing facilitating an emotional connection. The paper's discussion also implies the importance of utilizing the country of origin as part of the positioning strategy. This is in keeping in line with finding from literature that an origin bounded product like wine cannot get away

from the connection to its place of origin which also is an important purchase consideration of global wine consumers.

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#### ABOUT THE AUTHOR

**Samit Chakravorti:** The author teaches marketing in the department of management and marketing at Western Illinois University. He received his PhD in Business Administration-Marketing from Florida International University. The author's primary research and teaching interests lie in the areas of customer relationship management, marketing strategy and international marketing. The author has many years of marketing and sales industry experience in India where he is originally from. He currently resides in Macomb and Chicago, IL.