

# **Tradition and Innovation in Italian Wine Family Businesses**

## **Abstract**

### **Purpose**

Our paper analyses how a strategy based on the combination of tradition and innovation can offer a competitive advantage to a medium-sized family firm operating in the wine sector.

### **Design/methodology/approach**

This research focuses on one case study. The subject of the case study under analysis is Pio Cesare, an internationally recognised fine wine Italian company.

### **Findings**

Pio Cesare is characterized by a strong combination of tradition and innovation in terms of products and processes. Innovation and tradition are not opposites; on the contrary, a blend of the two has been crucial in achieving and maintaining a sustainable competitive advantage.

### **Research limitations/implications**

The formalization of an effective blend of tradition and innovation, especially in a family business, and an effective dissemination of the company philosophy to future generations, calls for a more in-depth study. This study has some limitations, which determined by the applied methodology. Multiple case study method would be useful. In relation to the interview technique, we would set out to increase the number of interviews, by also questioning managers and employees working, as opposed to family members.

### **Practical implications**

Practical implications relate to different groups of stakeholders: for owners and management, for investors, for organizations and institutions working on a territory promotion and in the tourism sector, and for politicians and local authorities.

### **Originality/value**

It identifies which business model a family winery business could be adopted in order to manage such strategies of innovation in respect to traditions, filling the gap in the literature.

**Keywords:** wine sector; family businesses; innovation; tradition; territory; cultural identity

## **Introduction**

The wine sector is one of the most representative economic activities in many countries in terms of employment and companies revenues (Bigliardi and Galati, 2013; Giacosa *et al.*, 2014a; Menrad, 2004).

Family businesses are common in the wine sector, due to both the tradition of some long-standing family companies (Giacosa *et al.*, 2014b; Contò and Lopez, 2008). A sort of “wine factor” is created (Georgiou and Vrontis, 2012): indeed, the wine represents a set of family values, symbols, and traditions rooted in the area in which the family is based, and more so if the family has a good reputation in the market (Gallucci and Nave, 2012).

Although innovation strategy is a critical issue for family businesses (Bresciani *et al.*, 2013; Craig and Moores, 2006), the literature on how family wine businesses approach innovation strategy is rather scarce and the relevance and significance of family businesses to the wine sector requires further, more in-depth studies of all aspects of the business (Contò *et al.*, 2015; Orth *et al.*, 2007). Indeed, a study of the most relevant research databases (Google Scholars, EBSCO) and international journals on family businesses (such as Family Business Review and Journal of Family Business Strategy), reveal a lack of research in innovation strategy in family wine firms, especially using a case study method, which is appropriate for this topic for several reasons (as illustrated in the methodology section).

The aim of this research is to fill this gap up. Our paper analyses how a strategy based on the combination of tradition and innovation can offer a competitive advantage to a small and medium-sized family firm operating in the wine sector. In particular, it identifies which business model could be adopted in order to both educate customers to appreciate more innovative products and processes, and to manage such strategies of innovation efficiently and effectively. In recent years, when the consumption of wine has been influenced by financial crisis, conventional strategies of international outsourcing might not be proving sufficient to maintain the company’s competitive advantage. Consequently, wine companies need to combine tradition and innovation.

This research is based on a qualitative methodology and focuses on one case study. We analysed Pio Cesare, an internationally recognised Italian wine company, characterized by a highly innovative business approach managed internally, without external consultants. The case study is relevant as it indicates that tradition and innovation have to coexist in order to achieve competitiveness and market success.

The paper is structured as follows: first, an analysis of the theoretical background to the main issues of our paper, and identifying a gap. The research method is then outlined. Next, the findings of the case study are presented and discussed. Finally, the conclusions and implications are set out, along with limitations.

## Literature

### *The wine sector*

A vast literature focuses on the wine sector, as this field is one of the most representative economic activities in many countries (Galati et al., 2014; Rossi *et al.*, 2012; Thrassou and Vrontis, 2006 and 2009; Vrontis and Pappasolomou, 2007; Vrontis *et al.*, 2011b; Vrontis *et al.*, 2006).

While the wine sector is not considered high-tech, many companies regularly develop a series of product, productive, commercial, and packaging innovations to actively respond to or modify customer demands (Toops, 2009).

In the wine sector, process innovation is primarily focused on production and commercial methods (Aylward, 2003; Dries *et al.*, 2014). The benefits of lower costs, higher productivity levels, better product quality, and customer satisfaction can be brought about by introducing changes in operations, such as in processing lines, logistics, packaging, and preservation methods (Clarke *et al.*, 2012).

“Wine tourism phenomenon” (Vrontis and Viassone, 2013) has been analyzed. This has a positive impact on competitiveness between producers in the same region and territory (Hall and Macionis, 1998; Hall *et al.*, 2000; Rossi et al., 2014; Vrontis and Thrassou, 2011; Vrontis and Paliwoda, 2008; Vrontis *et al.*, 2011b)

The wine sector would benefit from further study into the identity of a region, by referring to the business model of a family wine business. A schematic perspective of each variable that has an impact on regional identity would be of particular interesting.

### *The impact of innovation on consumer perception*

The innovation strategies identified by the literature can be categorized into internal, external, and a mixed innovation (Schilling, 2009). In addition, the distinction the literature draws between product and process innovation is not always clear cut (Bresciani *et al.*, 2015; Giacosa, 2014a). However, the application of this distinction has important theoretical and practical consequences for a firm’s innovation strategy (Adner and Levinthal, 2001; Bresciani, 2009 and 2010; Sood and Tellis, 2009).

For some researchers, only a combination between traditional and innovative strategies permits to achieved and maintain the competitive advantage, both exalting the company’s tradition values and taking advantages of new innovative opportunities (Bresciani, 2012; Dubini *et al.*, 2013; Re, 2013).

The literature has also analysed the impact of product and process innovation on consumer perception (Atkin *et al.*, 2006). In wine consumption, the cultural identity (Bonnekessen, 2010)—this can be traditional and local (Sims, 2009)—is linked to a wider desire for authentic experiences. Research has

also proved that customers appreciate local products, if these products embody the tradition, heritage, culture, ethnic diversity, and identity of a particular place (Contò et al., 2014).

Linked to the customers' perception, scholars have also focused on the role of country-of-origin image (Vrontis et al., 2011c) and all the associations this conjures up (Vrontis *et al.*, 2006). In addition, good branding is vital in this industry and the importance of a strong brand is growing, particularly for those leading companies operating in high-end markets (Giacosa, 2012).

It has emerged that every study on innovation in a family wine business has to consider the role of the country of origin and its impact on the consumer's perception.

## **Methodology**

In order to achieve the aim of this research, and referring to the gap that emerged in the literature, the following hypothesis has been developed:

*H: The business model of a family wine business must combine the principles of innovation with those of tradition. This combination is especially pertinent to the wine sector, which is characterized by changing consumption trends and established wine traditions of family businesses, and is also based on a strong regional identity.*

The research methodology was structured as follows:

- the first stage focused on a review of the existing literature, paying particular attention to how family firms manage innovation, as well as a study of innovative strategies in the wine sector;
- in the second stage, the case study method has been applied. We feel our choice of methodology is justified by the need to thoroughly investigate and understand the complex dynamics of innovation in family businesses and wanted to avoid a purely descriptive approach. Moreover, with the case study approach, the theories identified in the literature review stage can be directly analysed for relevance and effectiveness in a real-life context (George and Bennett, 2005; Yin, 2009).

The case study method was appropriate for this research for several reasons (Dana and Dana, 2005). Research into family businesses is often conducted through case studies, by means of comparing the family firm to other types of organizations (De Massis *et al.*, 2014) and understanding its specific mechanisms and dynamics (Chrisman *et al.*, 2012).

We chose just one case to study and Pio Cesare provided the perfect subject matter as the company is an extreme, unique, representative, leading case (Patton, 1990; Stake, 1995; Yin, 2003). For the following reasons, we considered Pio Cesare as a relevant case study:

- it is extreme in the sense that the company's attitude to innovation pervades all areas of production

and process, and this central philosophy affects every functional area and echelon of the firm.

- Pio Cesare is unique for the strength of its commercial strategy: to exalt the combination between high-quality wine and wine-related customer education, a strong presence of the family members around the world permits to ensure the company's values transmission to the customers.
- it is representative, as it shows the extent to which the wine market is altering, and demonstrates customers' continued interest in a high-quality wine culture.
- finally, it is a leading case, which illustrates how to apply and manage a strategy combining tradition and innovation in terms of products and processes, by adjusting consumer perceptions of wine.

We accessed a wide range of sources of information to develop and analyse the case study (Eisenhardt, 1989). Our main source of primary was provided from three semi-structured interviews (Corbetta, 2003; Eisenhardt and Graebner, 2007) with Pio Boffa Pio (PB), the CEO of the company, in 2015. He is directly involved in innovation-related decisions. We interviewed him three times to clarify some important topics. Each interview lasted approximately 2 hours and was conducted by two of the authors of the research. To reduce the subjectivity of data interpretation, the answers were transcribed, and then analysed by three authors autonomously (Jönssön and Lukka, 2005). The authors then compared their individual interpretation of the results.

We used direct observations in the interests of data triangulation (Stake, 2013; Yin, 1984). These were carried out in some wine shops and restaurants in which Pio Cesare wines are sold. Documentation was lifted from Pio Cesare websites, and interviews in economic, financial, and marketing magazines and websites with other family members (in particular, with Augusto Boffa (AB)—Pio Boffa Pio's cousin—and Cesare Benvenuto Pio (CB)—the son of Pio Boffa Pio's sister, who represents the fifth generation of the company) were also studied.

Double-level codification, categorization, and contextualization were employed when systematically analysing the data (De Massis and Kotlar, 2014). The first level of data codification took place on the matter of Pio Cesare's formalized management system, using as conceptual anchors the functional and managerial structure of the organization and relevant mechanisms, as well as the strategies applied for growth. The second level of codification was open (Strauss and Corbin, 1998) and axial by means of identifying the values and the management procedures applied in the central innovation strategy of the company.

## **Case Study: Pio Cesare**

### *The History of the Company and the Pio Cesare Family*

For five generations, the Pio Cesare family has produced traditional Piedmontese wines, bound in the long-standing principles of loyalty to the region's vineyards and the strictest quality assurances. The company is located in Alba, which is known in the world for its prestigious wines. The Pio Cesare winery was founded in 1881 by Cesare Pio, an entrepreneur who started to produce a small quantity of wine as a hobby to give pleasure to some friends. Very soon, Cesare Pio realized that wine production would become his life's mission. He was one of the first wine producers to believe in the great potential of great wines of the Langhe, a region ideal for wine production thanks to its climate and landscape.

The company is indisputably tied to the history of its current CEO, Pio Boffa Pio, the son of Giuseppe Boffa and Rosy Pio, who represents the 4<sup>th</sup> generation of the family. Born in 1954, Pio Boffa Pio joined the company in 1973. Other family members work in the company, such as Augusto Boffa, the cousin of Pio Boffa Pio, and all with the same kind of ethos and sense of vocation as Pio Cesare; in addition, the 5<sup>th</sup> generation is already on board: Cesare Benvenuto Pio, the son of Pio Boffa Pio's sister began work in the company in 2000.

Today the company owns over 70 hectares of vineyards located in the best areas of the Langhe, exclusively in the area dedicated to the production of Barolo (such as Serralunga d'Alba, Grinzane Cavour, La Morra, Barolo, Novello and Monforte) and to the production of Barbaresco (such as Treiso).

Thanks to the quality assurance and more than 100 years of history, the company's wines are known and appreciated by customers in Italy and in 54 countries around the world. The United States is the main market, representing 30% of total revenues; other important markets are Canada, South America, all the European countries, East region countries (including Japan, China, Australia, and New Zealand). With a turnover of about €7 million, the workforce comprises 26 employees, operating in the winery and the vineyards, plus some occasional, seasonal workers to cover busier periods, such as harvest time.

In order to support an effective implementation of its innovation strategy, the company adopts a flexible and flat organisational structure, which improves vertical and horizontal coordination and communication, enabling timely decisions and quick adaptation to the market.

The company is characterized by the synthesis of tradition and innovation. In the following section, the illustration of this union of old and new is presented via a study of the product range and the processes involved.

### *Tradition and innovation in the products*

The efforts to innovate result in both a greater variety of products, offering up an increasingly vast range of traditional Piedmontese wines and the continuous improvement of the quality of the existing products.

Barolo wine is the company's main offering in the product range, "it's the flag of the winery from 5

generations” (PB). Barolo is made in two different ways, as the company follows both old and new methodologies: i) the first one is a traditional production method (“the old way to make Barolo” (CB)), combining Nebbiolo grapes from several best areas dedicated to the production of Barolo and Barbaresco. It produces a traditional Barolo wine; ii) the second way is more innovative, as suggested by marketing experts, and uses grapes from a single vineyard called Ornato in Serralunga d’Alba, to enhance the characteristics of Barolo Serralunga, which always has great structure and longevity.

Furthermore, the product range contains all the best Piedmontese wines (Barbaresco, Nebbiolo, Barbera, Dolcetto, Arneis, and Chardonnay). Indeed, “The company motto is to produce fine Piedmont wines” (CB).

Across its entire product range, the company focuses on the family name (Pio Cesare) rather than the brand name of a vineyard or an invented brand name. “We are not an invented brand name (as it is the family name), thanks to a long tradition in the wine business of more than 100 years” (PB). Contrary to some marketing theories, the company prefers to be loyal to its traditional brand name—the family name.

In terms of products, quality and tradition make up the basic ingredients of company strategy. In other words, there is an “absolute respect for the founder’s wine-making style – he is a sort of light in our business activity – and respect for the family’s tradition in producing a fine quality product with the same label even after 100 years” (AB). The attachment to the family tradition makes Pio Boffa Pio so proud of his father’s compliments.

#### *Tradition and innovation in the processes*

To guarantee high-quality products, the company is engaged in a combination of tradition and innovation to optimise different types of operations. The case study has been investigated in the research and development, production and commercial processes:

*A) The research and development processes:* this activity is managed internally, without the recourse of external consultants. “A team of expert employees operate in the production side of things, composed of an agronomist, a cellarmaster, an oenologist with a great pedigree, and some cellarman with a vast experience. Nevertheless, the generation of our family who is currently in charge decides the wine style, providing strong direction in terms of grape production, wine must fermentation and wine ageing” (PB).

*B) The production processes:* the innovative nature of Pio Cesare reveals the identity of the producer and its place of origin: the family, and consequently the company, is linked to the best areas of the Langhe, representing one of the oldest families in the wine business of Piedmont. The company vineyards are located in the best areas for Barolo and Barbaresco production. It was both a strategy

choice and a vocation. “We are not interested in buying land outside these areas, as our purpose is to make fine wines. This territory is very generous, as all that grows is good: not only the grapes, but also the fruit smells of Barolo (PB)”.

Pio Cesare’s philosophy is largely based on the respect and loyalty the company has for the region in which their grapes are cultivated and in which the company is based. “The company is, and has been for generations, connected to Alba and the Langhe” (AB), which is an ideal region for wine production because of its geographical features and favourably mild climate.

The Boffa Pio family will always be known as a traditional family and a traditional wine producer: “I am proud of being defined as a traditional producer. For me, tradition doesn’t mean continuing to make wine in the old way, but we apply all the most modern techniques and equipment while ever they are necessary to produce a fine wine. We are wine interpreters, we are not flying winemaker. As chefs, we are trying to interpret what nature provides, treating raw materials and creating a high-quality product” (PB).

Even though the company is “recognized for its traditional vision, we are very careful to conjugate tradition to innovation” (CB). For this reason, they make large investments in technologies. Thanks to a great restructuring process, the historical and architectural relevance of the wineries has been enhanced. The surface area was increased, “but the winery looks exactly how it looked 100 years ago, with old Roman walls everywhere. We are the only winery and manufacturing company left in the historical centre of Alba” (CB).

The volume of production is always strictly limited, with the purpose of maintaining high-quality wines. The company produces not more than 400,000 bottles every year: “Not because a small number of bottles is necessarily a universal winning strategy, but because it’s the right strategy for us”. To respect both quality and tradition, which are “two words frequently used in the wine sector” (PB), it’s necessary to contain production from the vineyards, and make sure that the final products reach high quality standards. Indeed, “we don’t wish to increase our production, because - adding more vineyards - we are obliged to radically change our traditional style to produce wines, which securely depends from the territory of the vineyards” (PB).

Even if, in a small part, the company also buys grapes, they are produced by historical suppliers who, for generations, have cultivated their vineyards for Pio Cesare. The quality of the wines is closely related to the quality of the vines and the grapes produced from them. Their production level is high, thanks to the well-suited location of the vineyards, the company’s guidelines and strict quality controls.

“In respect of the tradition, diversity in the tradition represents an important concept for us” (PB). Even if most wineries use new methods to produce wines, differentiating themselves from the past,



Pio Cesare prefers to uphold a strong attachment to the production tradition and a constant focus on quality rather than quantity.

### *C) The promotion and distribution processes*

Promotion and distribution are handled personally by the family members. “I think the most important thing, when you go around the world, is to present a single face. I want my wine to be an expression of family members, associating our wines with the faces of the involved family members” (PB). Pio Boffa Pio and the other family members (Augusto Boffa and Cesarino Benvenuto Pio) travel with passion and determination all around the world and, every two years, they visit 54 countries.

They meet with the press and big customers for illustrating the company and the family tradition. The company is true to its values, which are not affected by trends at all.

The company does not use typical mass communication channels, such as television, newspapers and websites, since the strong presence of the family members in the world market, supported by distributors and importers, allows the company to be on the market with a common and shared philosophy. “My father said: ‘don’t show yourself, let’s the people feel you’.” (PB)

The distribution processes are implemented using a network of distributors and importers that operate in 54 countries around the world. Distributors and importers play an important role, as they spread the brand and reputation of the company around the world, as “they are not only sellers, but ambassadors of our wines in the world” (PB). Export managers are also supportive. But, for generations, the family prefers “to put the nose, the face, the figure behind the label, this is what the past (and the future) generations achieved” (PB). Pio Cesare wines are sold in all the best wine shops, restaurants, and food boutiques.

## **Discussion**

### *The role and approach of the combination of tradition and innovation in Pio Cesare*

In Pio Cesare, tradition relates to the respect of family values, for five generations, while innovation is closely related to the dual concept of “product/process” (Tushman and Nadler, 1986).

Innovative strategy is primarily conducted internally and is managed without the help of external consultants (Schilling, 2009). Pio Cesare is similar to other small and medium-sized family firms, where R&D activities are not formalized, but are rather conducted in a streamlined manner, creating a space for wide-spread creativity (Dias and Bresciani, 2006; Dyer and Handler, 1994). In carrying out creative activities, on one hand, the owner and staff take into account the family’s tradition and values, respecting the company’s image on the market; on the other, they communicate with one another, to ensure that the

creative choices are implemented in line with the economic and financial balance, and in accordance with budgetary constraints (Giacosa, 2011; Meigs *et al.*, 2001). It emerged that, in its innovation, the company is strictly connected to the “familiness” factor (Dunn, 1995; Sirmon and Hitt, 2003),

Pio Cesare has a strong competitive formula, based on a combination of tradition and innovation in products and processes (Adner and Levinthal, 2001; Drejer, 2004; Sood and Tellis, 2009).

### *Product innovation*

Pio Cesare follows a strong combination between tradition and innovation strategy, as its efforts to innovate result in both a greater variety of products, offering up an increasingly vast range of traditional wines and the continuous improvement of the quality of the existing ones thanks to modern technologies. In particular, traditional values characterize the efforts in producing a variety of Piedmontese famous wines in respect to secular production traditions over five generations, while innovation is concerning a close attention in the appealing to consumers’ five senses.

When consumers are sufficiently captivated (Quester and Lim, 2003), they are more likely to get involved in their buying experience (Flynn and Goldsmith, 1993). Across one family’s generations, a multi-sensorial strategy (Clarke *et al.*, 2012) highlights its specificity and the relation to the corporate values, family reputation, and cultural identity. This amplifies a long-term authenticity and prestige, and the brand awareness, increasing the exclusivity of the goods offered (Kapferer, 2002) and improving the regional identity.

The combination between innovation and tradition impacts on consumer’s perception of the company’s image. Indeed, product innovation is successfully managed within the company, combining extensive research into product quality with a focus on the consumer’s perception of the company’s image (Figure 1).

**Figure 1 – The consumer’s perception of the company’s image**

Source: personal elaboration

### *Process Innovation*

At Pio Cesare, processes are articulated as follows, and they are managed in a combination between tradition and innovation:

- i. Research and development activity: the company is an anti-model business, as the family members rate the quality of the wines, demonstrating the role of the family in the creation of the products (Denison, 2004; Dyer and Handler, 1994). Internal R&D is not formalized in a business function, which is rather common in small family firms, where R&D is normally part of production. R&D is very lean and informal.

Research and development activity is handled in respect to a strong combination of innovative and traditional values: innovation is characterized by the use of modern technologies, while tradition could be seen by a strong presence of the family members during the R&D process.

- ii. Production: the production process is a combination of traditional and innovative methods. In terms of tradition, all the wines are vinified by the company according to the most traditional company techniques. Tradition doesn't mean to make wine in the old way, but allows the introduction of the necessary technologies to produce fine high-quality wine.

In terms of innovation, the use of updated and different technologies represents a means to reach the desired products (Aylward, 2003; Dries *et al.*, 2014). They don't have to be fearful of adopting new techniques, if the purpose is to make traditional high-quality wines (Staudt, 1989). As mentioned above, upholding tradition doesn't mean you have to make wine using traditional methods, but the company has to interpret the wine also thanks to innovative tools.

In addition, the choice of the company to remain in its ancient cellars is a sign of attachment to traditional production methods. Even if other wine producers wished to move their production outside Alba, Pio Cesare's company and family roots are too entrenched in the city and its lands to consider leaving. This choice is respectful of traditions and the region, and of its DNA from the beginning (Festa and Mainolfi, 2013; Festa *et al.*, 2015): tradition is closely related to the area in which the family live and work, hence their culture is deeply rooted in such tradition.

- iii. Promotion and distribution: the promotion processes are managed in a highly innovative manner, if compared to other famous wine companies. Even though the market is very broad, promotion and communication policy is made by family members. The company's commercial philosophy is different from most wineries, as they are not wine traders but wine producers. The protagonist is the wine itself, represented as a long family tradition.

In addition, Pio Cesare is an anti-model winery, as it does not make recourse to typical mass communication channels (such as television, newspapers, and websites) and remain true to its values. Therefore, the company emphasises and respects its brand identity (De Chernatony, 2001), strongly linked to its family identity.

The following figure summarizes the whole innovation strategy of Pio Cesare (Figure 2).

**Figure 2 – The innovation strategy of Pio Cesare**

Source: personal elaboration

### **Conclusions, implications and limitations**

Pio Cesare is characterized by a strong combination of tradition and innovation in terms of products and processes. The highly innovative strategy is based on secular traditions in the wine sector over 5 generations, brought about by a strong connection to its territory.

The company is one of the most ancient of the region, and its connection between the wine business and the territory also means a close link with the traditional and cultural values of that region.

The positive impact between regional competitiveness and its drivers, on one side, and the customers' fidelity to regional brands, on the other, permits the company to reach good performance and increase its competitive advantage.

Although the company is highly innovative, innovation and tradition are not opposites; on the contrary, a blend of the two has been crucial in achieving and maintaining a sustainable competitive advantage.

Thanks to the innovation strategy, the company is able to operate competitively in a given context, thanks to new, improved or adapted products and processes. However, highly innovative ideas should always be supported by passion and tradition: innovation is a means to obtain fine wines, with respect to the traditional values.

We now turn to the theoretical implications of the research. In particular, there's a call for a more in-depth study into the formalization of an effective blend of tradition and innovation, especially in a family business, and an effective dissemination of the company philosophy to future generations.

Further to the scholarly value of the above findings, a number of practical implications are identified regarding practical implementation. These relate to different groups of stakeholders:

- For owners and management, Pio Cesare's example constitutes a best practice model for owners and management in the wine sector for several reasons, especially for family firms with a long history and a strong connection to the region;
- For organizations, institutions, politicians and local authorities, working on a regional promotion and in the tourism sector, and their representatives: cooperating with wineries provides an advantage in economies of scale, encourages knowledge sharing, piques tourists' interest and helps develop the region in question.

This study has some limitations determined by the applied methodology:

- we chose to adopt the qualitative method of a single case study;
- the number of variables analysed is limited to only certain aspects of marketing innovation, as it focuses on the role of management in the innovation process;
- lastly, the findings of the study are based on the initial results of lengthy research.

Future development of this research will focus on other representative case studies in the wine sector.

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