

Agents of Globality: The Role of Cultural Intermediaries in the Wine Markets of Japan and Singapore

Michel Rod¹, Nick Ellis², Tim Beal³

Work-in-progress Paper

¹ *Sprott School of Business, 1708 Dunton Tower, Carleton University, 1125 Colonel By Drive, Ottawa, ON K1S 5B6, Canada, phone: (613) 520-2600 ext. 6327, Fax: (613) 520-4427, email: michel_rod@carleton.ca*

² *School of Management, Room 606, Ken Edwards Building, University of Leicester, Leicester, LE1 7RH, UK, Phone: 0116 231 816, Fax: 0116 252 5515, email: n.ellis@le.ac.uk*

³ *School of Marketing and International Business, 11th Floor Rutherford House, Victoria University of Wellington, PO Box 600, Wellington, New Zealand, Phone: 64 4 463 5080; Fax: 64 4 463 5231, email: tim.beal@vuw.ac.nz*

Abstract

Purpose of the paper and literature addressed: Wine serves as a significant marker of societal, and market change in societies which are not traditionally wine drinking. Thus, there is an opportunity to look at those individuals who serve to provide a ‘bridge’ between different cultures; both in terms of how they act as intermediaries from a traditional marketing/supply chain perspective (through a better understanding of the relevant actor bonds, resource ties and activity links (Håkansson and Johanson, 1992), but also as *cultural* intermediaries from the perspective of how they influence ‘taste’ and the process of foreign culture assimilation/incorporation. In this paper, we explore the role and influence of cultural intermediaries in the developing wine markets of Japan and Singapore by taking a discursive view of relationships amongst these cultural intermediaries as well as between them and various members of the supply chain in international wine marketing – including consumers.

Research method: We explore cross-cultural issues by taking a discursive perspective to studying representations of self, and of inter-organizational and inter-personal relationships (Lowe et al., 2008) in the global wine business, specifically through the analysis of a series of accounts of cultural intermediaries and key stakeholders involved in potentially influencing the extent to which New Zealand wines achieve a greater presence in the Japan and Singapore marketplaces.

Research findings: In their talk, participants explicitly (and sometimes implicitly) construct ‘vertical’ relationships with downstream and upstream supply chain actors (consumers and producers respectively) as needing guidance or assistance; guidance that seemingly only they are capable of providing. They also construct ‘horizontal’ relations with actors in the shape of fellow cultural intermediaries. In these discursive constructions, evaluative positioning often occurs, as the various actors are constructed positively or negatively, depending on the nature of the legitimisation sought by the speaker as they seek to justify their contribution to the network. In order for the networks to ‘work’, cultural intermediaries emerge as nodes through which a flow of specialist knowledge about products and markets must occur.

Main contribution: The insights gained through an examination of discourse should help B2B practitioners in the increasingly globalising wine industry to navigate through the complexity of emerging wine markets in the Asian context. The social construction of relationships both

vertically and horizontally by cultural intermediaries in positioning themselves as necessary nodes in the network suggests that wine producers and others in the wine distribution channel/supply chain should attempt to develop relationships with all sorts of cultural intermediaries.

Key words: cultural intermediary; role; discourse; wine; Japan; Singapore

Introduction

Over a decade ago (Yergin, 1998) declared that globality was nigh but admitted ‘that does not mean that national values, tastes and character have disappeared’. With respect to wine, increased export orientation, decreased tariffs, lower logistics costs and the reduction in certain trade barriers along with changing wine consumption patterns have all served to provide wine producers with greater opportunities to sell their products outside their own domestic markets (Hussain, Cholette, and Castaldi, 2007). Consumption practices are shaped by a society’s specific traditions, beliefs and values thus the consumption of wine necessitates an examination in the light of a consumer’s socio-cultural context (Do, Patris and Valentin, 2009). Cohen, d’Hauteville and Sirieix (2009, pg. 51) state that “Wine is an emblematic example of a product for which consumption is marked by local culture. Wine is a part of Judeo-Christian culture and has been a source of poetic and musical inspiration since times immemorial, being the subject of much literature and iconography since ancient times” and where “quality” of wines is a “social construction” in which producers, the trade, consumers and the state all play a part”.

Throughout Asia, wine consumption has increased through the globalisation of drinking practices and this globalisation is reflected in the fact that diverse and dissimilar consumers drink similar items, in increasingly similar ways e.g. the desire to embrace a new and foreign modernity (patterns of conformity) or, on the contrary, in dissimilar ways e.g. where it has the image of an elitist product (patterns of resistance) (Do, Patris, and Valentin, 2009). What might be the reasons for, and the influences on this increase in the consumption of wine in emerging wine markets in Asia? Lee (2009) illustrates contentions that the trend towards snobism is a key driver in wine consumption in emerging Asian countries and that these consumers attempt to follow the lifestyle of Western consumers in the belief that they will experience Western culture and lifestyle by drinking wine. Lee (2009) further notes that significant growth in wine consumption in Asia is somewhat surprising because most Asian consumers have not traditionally drunk wine given each Asian country’s own traditional alcoholic beverages, such as “sake” in Japan and “sochu” in Korea and that the strong association between culture, eating habits, and food preferences makes it is very difficult for an individual to alter preferred food items and beverages, including alcoholic beverages. In looking at the demand for wine, Terrien and Steichen (2008) cite Pierre Bourdieu’s assertion that tastes are determined in a systemic way and that they are a result of the combination of personal experiences and social interactions – “both idiosyncratic behaviour derived from innate and acquired characteristics (experiences, habits), and a social behaviour taking into account the social status and the decisions of other actors” (pg. 261).

Thus, there is an opportunity to look at those individuals who serve to provide a ‘bridge’ between different cultures; both in terms of how they act as intermediaries from a traditional marketing/supply chain perspective but also as cultural intermediaries from the perspective of how they influence ‘taste’ and the process of foreign culture assimilation/incorporation. The former perspective would tend to focus on value co-creation in more service-intensive wine marketing channels and the relatively high levels of interaction between customers and wine service personnel in restaurants, appreciation

courses, winery site sales, tastings, tourism and other forms of hospitality that include wine (see Hollebeek and Brodie, 2009) versus the latter perspective which has as its focus the influence that enthusiastic consumers, sommeliers, wine writers, importers, food and beverage managers, retailers, etc. have in transcending any cultural and ‘taste’ barriers that might exist in particular emerging Asian wine markets. Guidry, Babin, Graziano and Schneider (2009) note that consumers from wine producing areas are ethnocentric in that French consumers typically prefer French wines, Italian consumers typically prefer Italian wines, etc., but that this ethnocentrism is generally not as pronounced in new world wine areas. They state that this reduced wine ethnocentrism may be due to the relative absence of wine being strongly entangled with culture and that globally, novice and even non-wine drinking consumers strongly associate wine with France and Italy. With wine not being associated with Asian culture, it is therefore useful to look at how its increasing consumption in emerging Asian wine markets might be explained. We believe that the persistence of local and cultural factors in markets and their dialectic with globalisation continues to ensure an enduring and important role for cultural intermediaries.

This paper explores cultural intermediation in the wine markets of Japan and Singapore in a case study of the New Zealand experience. Wine is an iconic symbol of globalisation in both countries where grape wine competes with traditional indigenous alcohols, and its assimilated precursor, beer. The differences between the wine markets in the two countries are a valuable indicator of their state of globalisation. Whilst Asia is far too diverse for any market to be seen as ‘typical’ or for two markets to exhaust the range of possibilities, Japan and Singapore have good claim to be a focus of this study. Japan is NZ’s major market for wine in Asia, while Singapore is up and coming. In Japan, NZ wines account for 1% of the market whereas in Singapore, NZ wines enjoy 3% market share. However, statistics provide only the starting point. They tell us what is happening, but not why.

Charters and Pettigrew (2008, p. 12) state that “There is an increasing interest in the consumption and social meaning of food and drinks in the discipline of marketing”, and in general, wine marketers tend to understand the basic demographics of their target consumer segment, but not the socialisation processes by which they become wine consumers (Olsen, Thach and Nowak, 2007). This highlights the importance of understanding the social and economic dynamics of the wine sector not only through the supply chain and a better understanding of the relevant actor bonds, resource ties and activity links (Håkansson and Johanson, 1992), but also through the role that cultural intermediaries potentially play in influencing consumer tastes and preferences; especially within Asia where wine acts as a marker of social change and globalisation (Beal and Rod, 2008).

Cultural Intermediaries

Cultural intermediaries engage in presenting and representing institutions providing symbolic goods and services while mediating taste and consumption practices in alignment with the needs of producers so an analysis of their role in influencing taste and consumption can contribute towards a better understanding of this social change (Bourdieu, 2000). Bourdieu (1986) argues that taste classifies the consumer and that consumer tastes are ultimately the result of interaction between their social origin, the direction of their social mobility and their education; with ever-increasing demand for expert knowledge to help consumers in their consumption - with the job of educating being one such responsibility of cultural intermediaries. Negus (2002) notes that cultural intermediaries occupy the space in between, and engage in creating points of connection between production and consumption while Featherstone (1991) argues that they are “specialists in symbolic production” (pg. 35) and “cultural entrepreneurs and intermediaries who have an interest in creating postmodern

pedagogies to educate publics” (pg. 5). There are those who view cultural intermediaries as being involved in the process of linking organisations and the world of culture through implicit knowledge and symbolic capital they possess about the discourses of culture and society (Thompson and Haytko, 1997). Accordingly, we view wine marketers, wine journalists, sommeliers and wine stewards, hotel and restaurant food and beverage managers and even creators of manga¹ (comics) as cultural intermediaries engaged in the trafficking of value and taste in ways that frame taste or the ‘appropriateness’ of certain goods and brands. They are key actors in the commercial exchange of expertise and in having the expertise to translate values and taste between producers and consumers (Appadurai, 1986) – and salient to this paper, in an environment where wine consumption is increasingly transcending cultural barriers.

Finding the right distributor and developing the right relationships is crucial in any market and for any product, but nowhere is it more important than in the Japanese and Singaporean wine markets. In addition, the relationship one has with a friend, a sommelier, a wine shop owner, or any other cultural intermediary who is in a position of authority or influence, will ultimately determine not only *what* one drinks—but even *if* one drinks (Wilkinson, 2009). Generally speaking, newcomers to wine choose French and it is only when the market develops in sophistication that consumers become more discerning, which in practical terms usually means a turn to ‘New World’ wines; that is wines from the Americas, Australia, and New Zealand. The focus of this research is to explore how cultural intermediaries might contribute to this ‘development in sophistication’ and in so doing, allow for better illustration of the resources and activities of this particular set of actors. Lenney and Easton (2009) argue that there has been little if any attention in the IMP literature to the goals, intentions, objectives and purposiveness of network actors, so our exploration of cultural intermediaries’ ‘roles’, aims and ‘purpose’ is a positive step towards addressing this paucity.

Business relationships in Japan (Lohtia, Bello and Porter, 2009) have been studied quite extensively in recent years. Yet studies of cultural intermediaries remain relatively under-explored in the B2B literature. The significance of processes of social construction in relationship management is acknowledged by some inductively-orientated researchers, chiefly those representing the IMP (Industrial Marketing and Purchasing) Group, thus from both a conceptual and methodological perspective, we position our own approach within this paradigm. IMP scholars (e.g. Axelsson and Easton, 1992; Johanson and Mattsson, 1994) are recognized as making major contributions to our understanding of industrial networks and have played a key role in the development of the relationship marketing paradigm in business markets (Ford and Håkansson, 2006). This social construction depends on the relationships actors have with other network actors where network identity is influenced by the perceptions held by individual firms or, more accurately, managers (Anderson, Håkansson and Johanson, 1994; Huemer, 2004). These perceptions will also be influenced by the activities performed by organisational actors along with the resources they bring to these relationships and this is extremely important in the wine industry. Perhaps peculiar to Asia though, Beverland (2009) argues that in Confucian societies, although the use of networks and relationships is critical for market entry to the wine industry, in some instances, the number of firms, the role of large and small firms, and timing of entry can limit the effectiveness of relationships versus more transactional marketing activities. This would seem to underscore the importance of gaining a

¹ One of the more curious drivers of the sales of specific wines in Japan is the manga (comic book) *kami no shizuku* or the ‘Drops of the Gods’. This has a readership of 500,000 each week and when a particular wine is mentioned, sales skyrocket - until the next issue at least (Beal and Rod, 2008).

better understanding not only of the role of cultural intermediaries since they act outside of the traditional channel regardless of its relational or transactional orientation, but also how they discursively construct their identities in performing these roles.

A discursive approach enables B2B researchers to consider the role of language-use in these perceptions through descriptions of “the ways in which actors in networks describe their own views of networks.....one has to understand pragmatics; to experience the speech community in action” (Easton and Araujo, 1993, p. 69-70). In this way it is possible to develop an understanding of how cultural intermediary identities are constructed by examining interaction processes, including the way they talk. The speech community we wish to explore is that of various cultural intermediaries involved in attempting to see wine consumption become a normal activity within Japanese and Singaporean society. Apart from DuToit, Kruger and Ponte’s (2008) investigation of discourses of black economic empowerment in the South African wine industry, there has been no evidence of the use of discourse analytic approach in looking at relationships within the wine industry. Others have utilised a discourse analytic perspective in looking at advertisers as cultural intermediaries (Kelly, Lawlor and O’Donohoe, 2005), or how cultural intermediaries activate product involvement and brand commitment (Coulter, Price and Feick, 2003).

This paper represents work in progress. It explores cross-cultural issues by taking a discursive perspective to studying representations of self, and of inter-organizational and inter-personal relationships (Lowe et al., 2008) in the global wine business, specifically through the analysis of a series of accounts of cultural intermediaries and key stakeholders involved in potentially influencing the extent to which New Zealand wines achieve a greater presence in the Japan and Singapore marketplaces. As such, we draw upon the talk of winery managers in New Zealand along with key Japanese and Singaporean cultural intermediaries (such as wine journalists, sommeliers and food and beverage managers) along with wine distributors, wine merchants and wine consumers. Having set up a philosophical argument for a discursive approach, we will then illustrate an exploration of Singaporean and Japanese cultural intermediaries’ accounts of what it is that they do in influencing the success (or not) of New Zealand wines in these two emerging wine markets. We shall conclude by reflecting on the contribution that a discourse analytic perspective can make to Industrial Marketing and Purchasing (IMP) Group scholars’ understanding of cultural intermediaries as one set of actors in B2B relationships in the global wine industry.

Methodology

We use the concept of the ‘interpretive repertoire’ to facilitate the study of discursive agency and constraint on the part of network participants. Repertoires are recurrently used systems of terms viewed as building blocks that speakers use strategically in explaining, justifying, excusing, etc. (Potter and Wetherell, 1987). They effectively function as ‘scripts’ (cf. Welch and Wilkinson, 2002) that can facilitate and/or restrict actors’ sense-making and identity construction. Repertoires can be identified through the examination of certain recurrent words, metaphors, figures of speech and grammar. They enable evaluative micro discursive constructions about the behaviours of the self and others; constructions facilitated by drawing upon a variety of normative macro discourses, such as ‘relationship marketing’, that demark what an actor ‘should’ do within the context of an inter-organizational relationship.

Discursive data was collected in Japan and Singapore in late 2008 by researchers from New Zealand. This took the form of transcripts from semi-structured interviews with a variety of participants with knowledge of the global wine industry. We spoke to individuals representing New Zealand wineries, Japanese and Singapore wine distributors, restaurant food and beverage managers, wine journalists, wine shop proprietors and sommeliers. Interviews were conducted in English, lasted between 45 and 90 minutes, and were recorded

on audio and video media. Participants were asked open questions concerning their role and the organization they represented, and to ‘tell us about’ their experiences with wine in the Japanese and Singapore markets. In total, accounts from 18 participants are analysed.

To manage the interview data our task was to identify interpretive repertoires that were employed within the relevant portions of the interviews. We sought to develop an understanding of how repertoires were used by identifying the various discursive forms of any one repertoire and exploring who used such forms, when and with reference to what. These steps were facilitated by NVivo software which allowed for a high degree of transparency and levels of agreement as each researcher in turn coded the data. Consistent coding of text to repertoire ‘nodes’ was guided by a protocol based in part on the management literature, but also on the *emic* responses of managers (cf. Ellis and Hopkinson, forthcoming). In this way, we hope to have captured some of the subjective network perceptions of our participants (cf. Anderson et al., 1994; Zhu et al., 2005).

Findings and Analysis

One of the most revealing discussions we had was with a husband and wife team who have established a winery in New Zealand, but whose business offices are located in Singapore, acting as a hub for the introduction and promotion of their wines to various Asian markets. They had much to say about the consumption of wine in the emerging markets of Japan and Singapore, and this opening quote serves to frame the background to our study. Note how the speaker (the husband) hints at the role of cultural intermediaries by expressions like ‘the people involved here’, ‘exclusive wine retailers’, and ‘presenting’:

Wine and the people involved have been a significant influence in the introduction of a traditionally western/European culture of wine-drinking into both Japan and Singapore... In 1993 access to wine was limited to one or two small high-priced and European exclusive wine retailers. Today, wine is available through numerous outlets, including the local petrol stations, convenience stores,... and a proliferation of small wine bars. Japan... has remained more rigidly attached to the traditional alcoholic drink of sake and is moving much more slowly in its acceptance of wine as a standard part of its dining and drinking culture... Both countries viewed wine - and in large part still do - as a status symbol. It was more important to present a wine that had recognition as being both expensive and high quality versus a wine that would suit the palate or the cuisine.

In the remainder of this section we will draw on all of our interviews. Several sets of linguistic resources were of significance to Japanese and Singaporean cultural intermediaries. We have organised these into six interpretive repertoires. The repertoires emerged from patterns of talk wherein the same phrases and terms were drawn upon repeatedly across the sample. In discourse analysis, it is not just the identification of linguistic tools that is important; what speakers *do* with language is also crucial. Thus, as we discuss each repertoire in turn, we highlight the role that it is claimed cultural intermediaries potentially play in influencing and sometimes reflecting consumer tastes and preferences. In the segments of talk presented below, in those verbal exchanges where a co-construction of meaning appears to be taking place, P represents the participant and R the researcher.

We argue that in their talk, our participants explicitly (and sometimes implicitly) construct ‘vertical’ relationships with downstream and upstream supply chain actors (consumers and producers respectively) as needing guidance or assistance; guidance that seemingly only they are capable of providing. They also construct ‘horizontal’ relations with actors in the shape of fellow cultural intermediaries. In these discursive constructions, evaluative positioning often occurs, as the various actors are constructed positively or

negatively, depending on the nature of the legitimisation sought by the speaker as they seek to justify their contribution to the network. Typically, a picture is painted of the cultural intermediary as a necessary node in the functioning of networks for wine consumption in SE Asia. In order for the networks to ‘work’, cultural intermediaries emerge as nodes through which a flow of specialist knowledge about products and markets must occur.

Repertoire One: The chain of influence

This repertoire draws upon the notion of the activities of certain actors in the network. It helps participants construct themselves as key influencers contributing to the globalization efforts of wine-makers. The main argument being presented is that the ‘role’ of cultural intermediaries is to educate other channel intermediaries as to the ‘role’ of wine. In doing so, they play a globalising bridging role in connecting local societies with the ‘West’, as well as helping to bridge the flow of knowledge (a key resource in the wine industry) between producer and consumer. Here the speaker is the same wine producer/promoter as in our opening quote:

The role of wine producers is to assist the educators in providing good information about the role of wine within the local society... The enjoyment of wines as a social catalyst, both within the indigenous society and connecting that society to the West, is something we, as wine producers, can provide... In the short time that we’ve been in the wine industry, we have had an influence on a very large number of people across many countries in Asia. In the past few weeks we have had numerous visitors to our vineyard including 22 Japanese sommeliers, and we have visited several countries including Japan, where we have run a Master class on New Zealand aromatic wines and Hong Kong where we trained serving staff at restaurants and hotels.

This repertoire addresses the notion of what and who influences wine consumption in Japan and in Singapore. In addition to the above portrayal of himself as acutely aware of the importance of cultural intermediaries, we can see here how the same participant expresses some particularly strong attitudes towards members of the wine distribution channel, constructing as he does so a notional hierarchy (‘level’) within the network. There is also reference to sommeliers being very influential, and interestingly these sommeliers are themselves influenced by various wine journalists:

We would go to sommeliers rather than distributors. We would go to both and that’s been our strategy because... a distributor is a prostitute at the end of the day and they’ll tell all people that go through them, yes we’ll sell your wine, it’s wonderful. We actually, our strategy is to always go to the next level. To go to the sommeliers and say what’s selling, why... [and asking] who’s a good distributor, and so that’s where you get the real intelligence by going down the channel and them pointing back.... [Sommeliers are] major influences in a restaurant or in a hotel chain. And they’ll be led by who they consider the right journalist, journalists to be... And they’ll again tell you who the journalist opinions are that they respect. (New Zealand winemaker based in Singapore)

This quote introduces a further intriguing set of cultural intermediaries, the writers of a particularly influential comic book:

There’s a really interesting... (Japanese) comic with a wine sommelier... Now the two people who write that have got no formal training in wine whatsoever but if they mention a product in that comic strip it goes off the shelf like you wouldn’t believe. (Wine distributor based in Singapore)

Repertoire Two: Capturing/releasing the wine

Capturing what was evidently quite a contentious issue in the industry; this repertoire was moderately common, occurring in the talk of a significant majority of our participants. It was often used to construct the consumer in a negative (ignorant) light, thereby implicitly positioning the cultural intermediary as an ‘expert’, or perhaps even a sort of ‘high priest’. Thus participants’ talk demonstrated ignorance on the part of consumers as to the benefits associated with screw-caps versus corks and the historical association of wine with cork. It also exposed the challenge to wine producers of dispelling common perceptions of a lack of quality associated with screw-caps, a challenge that they will probably need to draw upon the skills of cultural intermediaries in order to overcome.

A major part of the repertoire’s use was to construct the perceived ‘ceremony’ surrounding the opening of a bottle that has a cork, as suggested in these first quotes from Japanese consumers:

R: What is your attitude towards screw top versus cork?

P1: *For my image, it's a cheap wine.....Yes. Still people consider screw-cap seems very poor low quality.*

P2: *I think the opening of cork is kind of cool. (Tokyo focus group participants)*

In these next three quotes we see the speakers (all cultural intermediaries) asserting their own knowledgeable authority, and that of other intermediaries. Note how the third participant also acknowledges the ‘tradition’ of corks:

[Now] the screw cap is getting well known in Japan because there is no influence from the cork to the wine. (Japanese Hotel Food and Beverage Manager)

Still now many people prefer natural cork, but many sommeliers,... who are very, who have very keen sense to give notice the effect of screw caps. For example the oxygen transmission rate or the hygiene. Very clean... And the image about screw cap is increasing not negative, positive... Sommelier’s education, yes. (Japanese Wine Shop Owner)

Currently I think screw cap has made headway, big headway but if you look at the truly expensive wines it's still all corked and I think that there's also some kind of tradition with opening a cork. (former Singaporean winemaker and now a journalist)

Here, the speaker constructs a variety of intermediaries as possessing different levels of knowledge about the cork versus screw-cap issue:

Still now some restaurant people won't introduce the screw cap wine but normally with the customer in the wine shop is not minding now... The sommeliers are stuck with this idea that the ritual of the cork and also the ignorance, they just don't know about wine. They have that thinking, oh it's cheap. But eventually... all the people welcome the change to screw cap because it's easy to open. (Japanese marketer working in Japan for New Zealand winery)

Repertoire 3: Education about wine

Following on from the above theme, education was a very common repertoire. It was used to construct the importance of network actors becoming more knowledgeable about wine as part of the process of incorporating wine into one's consumption as well as the significant role that sommeliers play.

The first quote illustrates the perspective of a major New Zealand wine maker as to how knowledgeable (or not) the Japanese are regarding wine:

Well then there's the slow process of educating the Japanese who are not, I mean as a generalisation they're not the most wine savvy of people (Senior Manager of a major New Zealand Wine producer)

Perhaps peculiar to Japan, here we see the claim that being a particular category of consumer includes becoming better educated about various practices:

I think in Japan has wine schools... especially for the women, they like to go to wine school to study about wine... They have lots of school through private arrangement through sommelier, so to become good housewife they have to study about that... The Japanese loves to get the information before open the bottle. (Japanese journalist/marketer)

The same participant asserts that the notion of becoming better educated about a product appears to be especially important to the uninitiated wine consumer, and thus the cultural intermediary can potentially step into the breach to fulfil this need:

They take anything, if they have a hobby or an interest they take it very seriously and they are prepared to spend the time and spend the money to learn about it, yes..... There are specialist wine magazines, Wine Art, Wine Kingdom, there are networks of people, wine clubs, self study, web if they want to, depending on their level of interest. They can choose this information, yes.

Note how these following speakers (again, cultural intermediaries themselves) all claim to be addressing the need to provide education to the marketplace:

When I started XX I realised my biggest enemy was lack of knowledge in the market... So the first five years of my business and probably the next ten years of my business will still be wine education. Every day I would talk to a group of corporates or private individuals. (Wine distributor based in Singapore)

For the wine specialist in Japan sommelier, wine adviser or wine importer, those people, including me, we understand the quality of the New Zealand wine... but most of the people probably here are very little chance to know about New Zealand wine. (Japanese Hotel Food and Beverage Manager)

I thought, oh it's going to be great opportunity for Japanese people to know New Zealand wine. So I started website for Japanese people..... We provide wine event information as well. (Japanese journalist/website owner now living in New Zealand)

Repertoire Four: Fashion trends

This repertoire portrays the consumer as a more pro-active actor than some of the representations seen in earlier repertoires. The following excerpts illustrate not only the desire for more education about wine but also the fact that much of this is driven by what is considered to be 'trendy' by female consumers and by the younger generation. Linked to Repertoire One, the use of this repertoire suggests the role of the cultural intermediary in directing this type of sophisticated marketplace knowledge upstream to producers.

These quotes all came in response to questions about the existence of any differences between consumer segments, based on gender and age:

Yes because wine itself sound quite fashionable for them [women]. And they prefer to learn about wine... The female trying to find out the detail of the wine. For example the variety and the vintage... (Wine exporter/web retailer to Japan and/journalist)

Women, Japanese women like new trend, yes new trend, change lifestyle usually drink wine and champagne. She like new trend. (Japanese restaurateur)

In terms of age younger, they are getting younger now. In the past it was led by you know 40 to 50 something year old..., but right now I think the younger drinkers, the drinkers are age 18 to 28 start drinking wine. (former Singaporean winemaker and now a journalist)

In Singapore I think the younger generation now educating their parents to drink wine... So on occasions when you have family dinners you invite your parents to try wine... Wine is becoming a bit more of a social status, a market thing, a face thing..... An upmarket thing..... it seems very elegant, very sophisticated, very classy to have a glass of wine. (Singapore wine retailers/importers)

Repertoire Five: The provenance story

Closely related to both the education repertoire and the fashion repertoire comes the idea of provenance. Expressed by quite a few interviewees was the notion of there needing to be a good 'story' behind the wine. This story was argued as having a potentially compelling influence, particularly when related to the consumer by various members of the wine supply chain. Note the response of this participant to our question about cultural intermediaries:

R: And so they like to have information about the wine they are selling?

P: *About wine, about winemakers, about vineyard. If the winery is owned by families, to know about the family... Yes even the winemaker... because the people in Japanese like to feel they are part of the winery, if the winery is owned by a family so they want, especially for the importer, people like to feel I am part of the family to promote the wine. (former Singaporean winemaker and now a journalist)*

Stories come up in the following exchange between the researcher and the same participant where he notes that it his role to relay these tales to consumers.

R: The stories behind wines, is that important in the market?

P: *I think it is. Certainly I hear stories behind wines and my readers like those stories. They like to know about technical aspects but they also like to be entertained and they don't*

want too much technical stuff.....the personalised facts, they like the stories behind wine. Something about it, a little bit of history.....that's my role as a wine journalist. (former Singaporean winemaker and now a journalist)

The last excerpt illustrating this repertoire comes from the New Zealand husband and wife wine makers now living and operating out of Singapore. It shows how the producer takes responsibility for 'authoring' the story, and thereby supporting the cultural intermediaries in their roles as 'story tellers':

P: *Part of our business is telling stories and making sure that people are equipped all the way down the channel. So if you're looking at the distributors, you're looking at the sommeliers and you're looking at the people that are actually asking for the wine,... we've got a series of stories... about the gold mining on the vineyard, about the location, about the winemaker. So when we start to ship wine in packaging it will incorporate some of the stories so that a sommelier can take a story out and... say well look you know there's a vineyard with this beautiful lake down in the front and they are producing this fantastic pinot, would you like to try some? (New Zealand winemaker based in Singapore)*

Repertoire Six: Cross cultural combinations of food and wine

Another common theme in the interviews was wine as an accompaniment to Asian food. Participants noted the ability of wine to compliment certain Asian cuisine well, and suggested that the imparting of this knowledge is a role increasingly being played by sommeliers. They also constructed themselves as expert in these matters:

R: Wine: does that work with Japanese food, or should you just drink beer and sake?

P: *I know, I think Japanese food goes well with some wines, not all. If have got too strong flavour like California cabernet it's not good for Japanese. Japanese food is so sensitive, so soft taste. (Japanese journalist/marketer)*

Note how the above speaker stresses his knowledge from the outset with 'I know'. The next speaker emphasises 'in my experience', although he also acknowledges that consumers are becoming increasingly confident in making their own decisions:

Wine food matching, yeah look people tend to, my experience so far has been that Singaporeans... will also often ask of myself or my staff what do you recommend but more often than not they will make that decision themselves even if I do recommend a wine. (Singapore Restaurateur, NZ by birth)

The next quote re-asserts sommeliers as authoritative cultural intermediaries:

Sommeliers [are] becoming more and more professional and they're finding new ways to actually do the food matches. The better restaurants in Japan now have sommeliers who can tell you what to have if you're having a predominantly sushi type of, range of food they will advise that you know the wines that will go with that. They're becoming very, very good. (New Zealand winery operator based in Singapore)

Finally, this participant extends his knowledge claims of suitable food and drink combinations to a host of other national contexts, suggesting that perhaps the roles we have

observed being constructed in the talk of Singapore and Japanese intermediaries may be found in other cultures also:

I think... you'll see that more and more Asian restaurants, Chinese restaurants, Indian restaurants as well stocking wine... So what I've looked at is actually the national cuisines, dividing them into those dishes that are more amenable and friendlier to wine and those that are more difficult for wine. (former Singaporean winemaker and now a journalist)

Discussion

It was our aim to illustrate the discourse of various wine intermediaries as mediators of social change in two emerging wine markets in Asia. As such, we were interested in the extent to which they viewed their roles as influencers of 'taste' and/or consumer behaviour, what they saw as being key issues for or against the adoption of wine consumption, and indeed, even what they saw their roles as encompassing. In subsequent work, we will look more specifically at the discursive, cultural and perhaps political construction of cultural intermediary 'roles' and identity construction (Simpson and Carroll, 2008), but specific to this research, we were able to unpick a number of repertoires that cultural intermediaries draw upon in their discourses about wine. The most significant of these including the idea that they are educators – providing cultural and historical information and stories about wine not only to satisfy the (especially) Japanese desire for information but also to assist wine newcomers in matching wine with local cuisine, (older) myths around quality and the cork versus screw cap quandary.

These findings address the notion of cultural intermediaries as being mediators of knowledge; however an equally interesting and significant finding is that this mediation of knowledge also serves to bridge cultural divides. There is a functional aspect to this facet of globalisation in that cultural intermediaries facilitate the adoption of wine consumption in emerging Asian markets simply through promoting it as a social accompaniment much like local alcoholic beverages, but also that wine has the capacity to enhance local cuisine. We have illustrated that in their talk, cultural intermediaries construct 'vertical' relationships with consumers and producers with guidance that seemingly only they are capable of providing. They also construct 'horizontal' relations with fellow cultural intermediary actors. Thus, a picture is painted of the cultural intermediary as being a required cog in the functioning of networks for wine consumption in Japan and Singapore such that for the networks to 'work', cultural intermediaries emerge as bridges or links through which a flow of specialist knowledge about products and markets must occur.

Both of these findings speak directly to both Bourdieu's (2000) and Featherstone's (1991) illustration of the importance of cultural intermediaries as shapers of taste in the rise of the new petite bourgeoisie and the need for expert knowledge in helping consumers to decipher increasingly complex cultural terrains. For us, it also helps to illustrate that the adoption of wine drinking or the incorporation of wine into one's non-traditionally wine-drinking society involves these cultural intermediaries acting as gatekeepers entrusted with the task of attracting previously 'excluded' individuals into the global wine community (Durrer and Miles, 2009). Cultural intermediaries then, as communicators and distributors of 'cultural products' and as translators of cultural products into meaningful local, consumption experiences (Venkatesh and Meamber, 2006), are at the heart of what we stated in the opening of our paper and in its title. In the emerging wine markets of Japan and Singapore, cultural intermediaries are agents of globaility; playing a significant role in the successful

globalisation of wine while at the same time ensuring that (especially for those who are open to exploration for non- 'status' reasons), local culture is not ignored.

Managerial implications

The insights gained through an examination of discourse should help B2B practitioners in the increasingly globalising wine industry to navigate through the complexity of emerging wine markets in the Asian context. B2B marketers might wish to consider how to construct their own network identities in developing relationships with various cultural intermediaries. To succeed in Japan it appears to be necessary to provide information and stories to establish and maintain an attractive identity. Analogous to products moving through the product life cycle having differing marketing communications objectives with introduction and early growth requiring more informative communications and later growth and maturity requiring more persuasive communications, our findings might suggest that different cultural intermediary roles should have different priorities in these two markets. In Japan, there would appear to be much more receptivity to the cultural intermediary as 'educator' whereas in Singapore, there is perhaps more of a role for persuasion based on communicating appropriate 'taste'. Thus especially in Japan, wine marketers need to augment their push strategies for communicating information down the channel with pull strategies targeting various cultural intermediaries such that the latter are better able to pass along this information and hence their expertise as well as 'stories' to consumers. This knowledge would encompass such areas as quality and the screw cap versus cork issue, storage and serving temperatures, and food-wine matching. Besides these generic strategies, marketers need to fashion strategies tailored to their specific situation. Marketers from countries with a large share of the market – France, Italy, and the United States - can talk directly to consumers and intermediaries such as journalists through advertising. Small countries such as New Zealand do not have the resources for direct-to-consumer appeals, but can utilise B2B linkages with tourism organisations. Marketers from Italy have the huge advantage of the widespread popularity of Italian food. Therefore, utilising context is an essential ingredient of a successful strategy. In Singapore, we might see more of a role for cultural intermediaries in mediating taste and consumption practices in alignment with the needs of wine producers for whom they have established good relationships, i.e., being less education focussed and more persuasion-oriented.

These findings also have additional implications for practice. Since the significance of processes of social construction in relationship management has been acknowledged by researchers operating within the IMP/B2B paradigm (Anderson, Håkansson and Johanson, 1994; Axelsson and Easton, 1992; Ford and Håkansson, 2006; Huemer, 2004), and we have seen the social construction of relationships both vertically and horizontally by cultural intermediaries in positioning themselves as necessary nodes in the network, it perhaps behoves wine producers and others in the wine distribution channel/supply chain to attempt to develop relationships with all sorts of cultural intermediaries such that the cultural intermediaries can then act to promote particular wines directly or indirectly; whether through their writing (journalists and publishers), their choice of purchases/inventory (hotel and restaurant food and beverage managers), or their suggestions/recommendations (sommeliers).

Reflections, Limitations and Future Research

Our interviews included a common schedule of broad questions sensitized by our exposure to the largely 'Western' extant literature on wine marketing. This approach meant that, frequently, the researcher's voice was perhaps heard a little too much in interview exchanges.

This could have given cultural intermediaries greater freedom to explain in their own way the contextual factors that they viewed as influencing their roles/ practices. These limitations also need to be considered alongside the dilemmas in interpretation encountered in all such interview-based research endeavours. This may well be the case when Asian cultural intermediaries aspire to notions of being wine experts influenced by a non-Asian history associated with this particular industry.

Apart from the earlier suggestion that we will look more specifically at the discursive, cultural and perhaps political construction of cultural intermediary 'roles' and identity construction (Simpson and Carroll, 2008), and the suggestion that this work be replicated in other emerging wine markets, we also suggest that a potentially fruitful research avenue might be to build on the work of Jamal (2003) who looked at 'culture swapping' and the role of retailers of different ethnic backgrounds (as cultural intermediaries) and their role in promoting co-existence, tolerance and freedom of lifestyle across consumers of various ethnic backgrounds. This would appear to have salience in looking at cultural intermediaries (with wine retailers being one such group of intermediaries) as agents of globality – in bridging/mediating local culture and practice with the ever-expanding presence of global wine producers in societies not traditionally know for wine drinking.

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