



## COVID-19 AND SMALL WINERIES: NEW CHALLENGES IN DISTRIBUTION CHANNEL MANAGEMENT

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### Abstract

**Purpose.** The present article aims to shed light on the major challenges in distribution channel management that small wineries are called to face after the COVID-19 pandemic.

**Design/methodology/approach.** The study is explorative by adopting a qualitative methodology to analyse the case of a small Italian winery and how it managed distribution activities during COVID-19 pandemic. The study collected data through interviews and secondary data. Results have been abductively developed.

**Findings.** The study delves into the challenges related to managing distribution channels during crises and highlights how the omnichannel approach can support small wineries and help them overcome future crises. Practical and Social implications. The study supports small wineries in understanding how to cope major worldwide crises such as the COVID-19 through the adoption of the omnichannel approach.

**Originality of the study.** The study provides a novel perspective on wine marketing and omnichannel approach management and how the omnichannel approach might be of support to small winery in overcoming crises such as COVID-19. This work contributes to the extant literature on small winery and distribution channel management literature by providing a novel perspective as it empirically investigates the ongoing phenomenon of the COVID-19 crisis.

## 1. Introduction

The COVID-19 pandemic brought an unprecedented and sudden disruption to businesses as policymakers limited the flows of people and goods worldwide. The uncertainties caused by the pandemic led to risks for the future of many firms, especially for those of smaller dimensions, such as SMEs. Notably, the wine industry as a whole, and especially small wineries, face new emerging complexities and challenges (Dana et al., 2013; Sanchez-Recante, 2020; Obniavko, 2021). The main threats brought by the pandemic are also linked to changes in wine consumption (Pencarelli et al., 2020; Solanelles et al., 2021). In Italy, small wineries were heavily impacted by the closure of the Ho.Re.Ca. (Hotel, Restaurants and Catering) channel, the cessation of international travel, and the impossibility of direct sales in wine shops for over three months. The Ho.Re.Ca. channel registered a 41% decrease in wine sales volume in 2020 (Federvini, 2020; Fondazione Merloni, 2020; Del Rey & Piccoli, 2020). As Del Rey and Piccoli (2020) highlight, over 90% of wineries use Ho.Re.Ca. as their primary distribution channel, while 11% of them use it as their only distribution channel. Typically, small wineries suffer from a lack of resources to develop their business in a short time (Pencarelli et al., 2020). Therefore, a quick shift to alternative distribution channels was difficult, and venturing into retail channels might not have been a viable option for small firms. Nevertheless, these occurrences require firms to identify new distribution channels to reach B2B and B2C customers.

The present study aims to provide a new perspective within the wine marketing literature. To the best of our knowledge, there are no previous studies that explore wine distribution challenges during pandemics which brought several disruptions to distribution channels; also, this study aims to delve into how small wineries are innovating their approach to distribution channel management. It endeavours to understand how small wineries dealt with the breakdown of their traditional distribution channel(s) due to COVID-19 and explores the kind of countermeasures these small wineries have developed in order to continue selling and reach B2B actors and consumers.

The study adopts a single case study methodology of a small Italian winery with the objective of shedding light on and providing a new understanding of the pandemic's effects on managing wine distribution channels. The data collection consisted of in-depth interviews with key informants such as the winery entrepreneur/owner, the employees, and partners; secondary sources included industry reports. The data was analysed abductively as the study unfolded to obtain new insights and lastly, it was triangulated to ensure reliability and correctness (Eisenhardt, 1989; Eisenhardt & Graebner, 2007; Yin, 2014).

The remainder of the paper is organised as follows: the next section provides the literature background on wine distribution and its new challenges; the third section describes the methodology and the data collection process; the fourth and fifth sections provide an overview of the case company findings and discussion; lastly, the sixth section offers concluding remarks as well as limitations of the study and further avenues of research.

## 2. Literature background

### 2.1 Wine distribution

The wine distribution context is characterised by a plurality of actors present (Pomarici et al., 2012). Although small wineries are increasingly moving toward developing self-owned distribution channels, the role of external partners remains paramount in managing the distribution of wine (Kung, 2007; Escobar & Gil, 2016; Pomarici et al., 2021).

A first-level classification of the actors is *market makers* and *matchmakers* (Baritau et al., 2006; Hall & Mitchell, 2008). The difference lies in the way goods ownership flows in the intermediation process and how each actor is compensated. The actors belonging to the market makers category are wholesalers, distributors, importers, or exporters who participate in the ownership flow and whose rewards come from the bid-ask spread. Instead, the actors who constitute the matchmaker's category are agents and brokers whose reward comes from a commission resulting from buyer and seller matching; moreover, matchmakers do not participate in the ownership flow. Matchmakers and market makers are essential for small wineries, especially in developing international trade (Mora & Akhter, 2012; Fraboni, 2019). The complexity of the wine distribution arena ensues from the significant difference between market makers and matchmakers, as well as from the presence of numerous large companies and many minor or niche actors (Gaeta & Pomarici, 2001; Hall & Mitchell, 2008).

A further level of key actors' classification entails B2B actors and the peculiarities of which the present study also considers within the context of the wine distribution (See Figure 1). B2B actors are identified by *on-trade* and *off-trade* consumption. Among on-trade channels, Ho.Re.Ca. (Hotel, Restaurants and Catering) represents the most critical distribution channel for small wineries (Del Rey & Piccoli, 2020) because, through it, these small businesses see the possibility of improving their brand image and perception thanks to the direct relationship between wine and food (Hall & Mitchell, 2008; Velikova et al., 2019; Sabatini et al., 2021.). By contrast, off-trade consumption passes through supermarkets and grocery stores, retail stores, and specialised stores (bottle stores, vintners, and wine cellars).

Retailers are known for their aggressive buying strategies (PTV, 2012) and the enormous sales volumes required. Therefore, the larger retailers tend to exclude small wineries as suppliers because of their size limitations (Pomarici et al., 2012).

To strengthen their relationships with B2B actors, wineries provide training on the products and the winery’s heritage, as well as support to the distributors’ sales staff (Thach & Olsen, 2006). Indeed, these efforts motivate the distribution channel to sell more effectively (Rosenbloom, 1978).

Moreover, selling directly to consumers has become increasingly more common among small wineries as an alternative to traditional distribution channels (Gurau & Duquesnois, 2008; Rossi et al., 2012; Fiore, 2016; Gregori et al., 2013; Pencarelli et al., 2020;). In this respect, small wineries rely on tourism and local wine lovers who are looking for new experiences (Pomarici et al., 2012; Mancino & Lo Presti, 2012; Del Rey & Piccoli, 2020). Small wineries also develop direct and indirect online distribution channels (through owned or third-party e-commerce platforms) to reach buyers and consumers and to increase brand awareness (Louvieris et al., 2003; Bonn et al., 2016; Saghiri et al., 2017; Fernàndez et al., 2019; Del Rey & Piccoli, 2020, Kumar & Ayedee, 2021). Despite online sales increasingly becoming a viable solution, this strategy requires commitment and a proactive attitude (Laroche et al., 2013; Mozas et al., 2016). Small wineries continue to have concerns about managing the last mile when delivering their products to customers (Obniavko, 2021). Nevertheless, as Sellitto’s (2004) findings show, online channels are a viable solution for small wineries that struggle to reach large distributors.

It is worth noting that, in the agri-food sector, there is a positive correlation between internationalisation and ICT (Moral et al., 2015; Fernàndez et al., 2019). Social media and online channels are a means for improving customer loyalty (Szolnoki et al., 2014) and a successful strategy for attracting younger customers (Fuentes Fernàndez et al., 2017; Effendi et al., 2020).

	Matchmakers & Market makers	B2B	B2C
Distribution & relationship channels			
Traditional			
Online			

Figure 1 – Small winery distribution channels and contexts (Source: our extrapolation)

## *2.2 Overview of new challenges in wine distribution*

The literature on wine distribution management highlights how small wineries are now at a turning point (Pencarelli et al., 2020). Within this context, the present study considers some of the more significant challenges facing small wineries, specifically concerning distribution channels. This stream of literature developed as the effects of the pandemic disruption on small wineries became apparent and addressed the strategies adopted by those that did manage to survive.

Many changes have occurred in the behaviour of customers who want to interact with a company at any stage in the purchasing process, especially in digital channels (Saghiri et al., 2017). Wineries have had to deal with consumer buying attitudes that are now more oriented towards sustainability and healthier agri-food products (Giacomarra et al., 2016; Sabatini et al., 2021) as well. Also, the COVID-19 pandemic caused customers' purchasing habits to change (Solanelles et al., 2021). Nowadays, wineries are challenged to be more oriented toward innovation to meet consumers' and stakeholders' needs and to adopt new distribution approaches (Presenza et al., 2017; Canavati et al., 2020).

### *2.2.1 Dealing with COVID-19*

The wine distribution scenario worsened with the economic crisis that resulted from the COVID-19 outbreak. Suddenly, the Ho.Re.Ca. channel shut down. This meant that small wineries' main distribution channel, which absorbs significant percentages of their total sales flows (Del Rey & Piccoli, 2020), was blocked. Unfortunately, online sales and home deliveries only partially compensated for the "wiping out" of Ho.Re.Ca. (Del Rey & Piccoli, 2020). Many small wineries were not ready to pivot toward new digital distribution channels and had to try to catch up during the pandemic (Coyne, 2020; Sabatini, 2021).

Moreover, wineries felt the tremendous negative impact of COVID-19 on tourism. After the lockdowns, only a pre-existing base of domestic tourists continued to buy from wineries while international visitors had not yet returned (Wine Tourism, 2020). Even worse, many small wineries found themselves unprepared to manage distribution during a crisis. According to Barcaccia et al. (2020), the general uncertainty resulting from the national lockdown brought people to rethink their daily needs and prioritise healthier products. Therefore, wineries needed to intercept consumers at every touchpoint along the distribution channel to overcome the crisis by integrating multiple channels (Saghiri et al., 2017).

### 2.2.2 *Achieving a multichannel distribution strategy*

Adopting a multichannel strategy relies on integrating and coordinating new distribution channels with pre-existing ones (Sharma & Mehrota, 2007; Herhausen et al., 2015; Verhoef et al., 2015). According to Gurau and Duquesnois (2008), one of the challenges for winemakers is to understand both the advantages and the risks of implementing a multichannel strategy (See Figure 1). A multichannel distribution system implies using multiple offline and online channels to reach the market (Ailawadi & Farris, 2017). Multichannel adoption also offers advantages like enhancing customer loyalty (Herhausen et al., 2015), achieving higher revenues (Kushwaha & Shankar, 2013), and balancing channel dependence (Rosenbloom, 2007).

Adopting a multichannel strategy entails facing multiple challenges (Calderòn et al., 2019) that can have a significant impact on pre-existing channels and business relationships (Neslin et al., 2006); examples include data integration across channels, understanding customer behaviour, channel evaluation, allocation of resources, and strategy coordination (Neslin et al., 2006). Moreover, managing the relationship between channels is of paramount importance, as conflicts and cannibalisation may arise when channels compete for the same group of customers (See Figure 1, *red arrows*) (Herhausen et al., 2015; Verhoef et al., 2015).

### 2.2.3 *Omnichannel: is this the future of wine distribution?*

In line with Verhoef et al. (2015), the omnichannel approach leads to the synergistic management of available channels and customer touchpoints to optimise customers' experience across channels. Adopting the omnichannel approach implies that online and offline channels provide customers with a seamless shopping experience where technology blurs the distinction between physical and online channels (Chen et al., 2018; Melacini et al., 2018; Banerjee, 2019; Mishra, 2020). However, implementing omnichannel distribution is a challenging task that requires high resources and commitment (Picot-Coupey et al., 2016), supportive organisational culture (Jocovski et al., 2019), functional area restructuring (Cook, 2014), and finally, investments in technology, human resources, cross-channel integration and logistics (Lapoule & Colla, 2016; Cao & Li, 2018; Kembro et al., 2018). It becomes evident, then, that implementing omnichannel management would be extremely difficult for small wineries, compared to large ones, due to their scarcity of personal and financial resources (Pencarelli et al., 2020). In the academic literature, interest in omnichannel management appears to have broadened somewhat; however, the challenge remains to fully understand the process for a successful transition from multichannel to omnichannel distribution (Casali et al., 2018; Banerjee, 2019).



### 3. Methodology

The present study calls for a qualitative approach to exploring the ongoing impact of COVID-19, a phenomenon that has not yet reached its conclusion. Thus, the scenario in which firms have been operating was and is still changing, even while the study was being conducted (Voss et al., 2002). A single case study methodology (Eisenhardt, 1989; Yin, 2014) was adopted to shed light on how small wineries have been navigating the new challenges in distribution channel management during the COVID-19 pandemic.

The study considers the perspective of small wineries and looks at how these firms managed their distribution channels during the crisis. The objective of the study is to offer new insights on small winery distribution channel management. Although the potential of the omnichannel approach has been already conceptualised, there is no evidence on how this new approach might support small wineries in overcoming crises. The research questions our study aims to answer are the following:

*RQ1: How have small wineries' distribution channels been challenged during COVID-19?*

*RQ2: How can the omnichannel approach support small wineries' distribution channel management during times of crisis?*

The Alpha (a fictitious name) case was selected for its revelatory potential (Siggelkow, 2007) as it allowed the researchers to observe the ongoing phenomenon and gather information directly from key actors involved. Data collection was also facilitated by the researchers' proximity to and the pre-existing relationship with the winery (Yin, 2014). Moreover, Alpha is in the Marche Region, one of the most renowned Italian regions for wines such as Verdicchio, Lacrima di Morro d'Alba, Rosso Conero, and Rosso Piceno (4% of total Italian production). In this territory, there are over 500 wineries, although only 22 have a turnover of more than one million euros. The high number of small wineries makes them important for the regional economy (Fondazione Merloni, 2020; Del Rey & Piccoli, 2020).

At Alpha, ten interviews and longer meetings with the owner, his partner and their broker for global markets have been conducted so far. Participating in longer meetings was required to obtain marketing and sales reports about the pandemic's effects on business relationships and distribution channels worldwide. In addition, the researchers maintained frequent contacts with the winery owner by phone when specific information was needed. Thus far, more than two years' worth of observations and 22 hours of interviews have been collected, analysed, and coded (Table 1).

Table 1 - Data collection process overview

No.	DATA	KEY INFORMANT	LENGTH	SUPPORT
1	22 Jan 2019	Winery owner	1 hr.	Audio + Verbatim
2	03 Apr 2020	Winery owner and partner	3 hrs.	Notes
3	28 Jul 2020	Winery owner and partner	3 hrs.	Notes
4	04 Nov 2020	Winery owner and partner	3 hrs.	Notes
5	17 Feb 2021	Winery owner and partner	3.5 hrs	Notes
6	24 Mar. 2021	Winery owner	1 hr	Audio + Verbatim
7	19 Apr. 2021	Winery owner and partner	1 hr	Notes
8	25 May 2021	Winery owner and partner	4 hrs	Notes
9	14 Jul. 2021	Winery global market broker	1 hr	Audio + Verbatim
10	21 Jul. 2021	Winery owner and partner	2 hrs	Notes

Semi-structured interviews were helpful to grasp details and to ask the informants specific questions (Kvale, 1997). Furthermore, to ensure the validity and reliability (Yin, 2014) of the data gathered from the key informants, the researchers also collected a considerable amount of secondary data through multiple sources online, which consisted mainly of reports and insights on wine global sales dynamics and post-pandemic forecasts. Triangulation between the different data sources ensured the validation of the data collection and the completeness of key informants' perspectives (Yin, 2014).

The findings of the study were developed abductively through manual coding and constant comparison between the case findings and the theoretical background of the research (Corbin & Strauss, 2014; Dubois & Gadde, 2002). The analysis was developed by three researchers and then discussed and merged to develop literature and managerial contribution from the use of the case.

#### 4. Case company Alpha

Alpha is a small Italian winery established at the beginning of the 2000s after the owner inherited the land from his grandfather. Since its inception, Alpha has been very focused on building relationships with business partners, both local and global. It sells approximately fifty thousand bottles yearly, for a turnover of around 400,000 euros.

Alpha has developed a strong aptitude for managing several agents and distributors to support its sales globally. Indeed, foreign sales accounted for nearly 50% of the winery's total sales. In addition, Alpha has also developed its direct sales channels; customers can buy directly in the winery



shop or via online contacts through the website and social media. Most of the customers that use direct sales channels are foreign tourists coming mainly from Europe.

Before the COVID-19 outbreak, the winery was keen to boost its growth through several investments such as new wine shops and new types of wine to meet the high standards of consumers' tastes. With the sudden outbreak of COVID-19, policymakers imposed national lockdowns that led to the closure of the Ho.Re.Ca. industry and significant limitations on direct sales in the winery shops. In fact, during the pandemic lockdown, the winery's sales dropped dramatically, and the winery is still struggling to achieve its previous sales figures. The only distribution channels that continued to do business during lockdown were retail and online, but these channels experienced a decrease in consumption and turnover (Del Rey & Piccoli, 2020). Since then, the winery has experienced partial recovery from COVID-19 restrictions and perceived good signals coming from business customers and consumers. Alpha's initial concerns have been alleviated by the reassurance that comes from sales through other channels managed by the firm's agents and distributors worldwide.

Thanks to the pre-existing business relationships developed in the previous years with agents and distributors worldwide, Alpha's sales maintained a steady course and, in some cases, increased. In fact, Alpha established new online channels to maintain relationships with its global partners, and the attention devoted to these partners is indicative of Alpha's owner's attitude and outlook; he has always participated in international trades and business trips abroad. The owner's willingness to maintain these relationships with agents and distributors has allowed the firm to rely on multiple actors to support product distribution, which was only partially threatened by the COVID-19 crisis. The Alpha online channel was developed following the winery's American online distributor's request to strengthen its digital presence. The Alpha Winery owner stated:

"The pandemic has revealed that international markets are more ready with online sales. The Italian market has proven to be more conservative and tied to physical presence. In this moment of difficulty, foreign countries have continued to do business while everything went into shut down."

The owner suggested that small wineries could adopt two approaches to reaching final consumers through online sales: creating an owned channel or developing a business relationship with an online retailer. The Winery Owner created an owned online channel to communicate and broaden information about the winery; he chose the second option to develop Alpha's online sales. Indeed, developing an online sales channel implies a great effort for small wineries to manage the complexity derived from logistics, customers' needs, and channel integration requirements.

Alpha's ability to manage different distribution channels allowed the firm to achieve significant sales levels during the pandemic (See Figure 2). Alpha has shown that it is not dependent on just one or only a few distribution channels, but on the contrary, it has built a strong global presence with several actors. Alpha has been able to exploit the peculiarities of its distribution channels and use one or another channel according to the unexpected changes taking place. As the owner suggests, the relationships with global partners, especially distributors, have not changed during the pandemic. It is only the proportion of digital channels used to interact with these actors that have registered an increase.

However, not every international distributor was ready with their digital channels. The winery has had to face the additional challenge of dealing with actors' preparedness to face the distribution crisis. The winery owner described several situations in which distribution actors were still leading online sales and others in which the distributor chose to stop the activities due to Ho.Re.Ca. closures. As a result, in some cases, Alpha is still struggling to find a proper structure for efficient operation. On this point, in particular, the key informants brought up several issues associated with combining digital tools and physical distribution.

The winery owner posits that all small wineries should create a more capillarity distribution and seek better proximity to the end consumers in order to cope with such complex events. Establishing multiple relationships and distribution channels simultaneously was crucial for the winery's survival during those difficult times (See Figure 2).

	Market Maker & Matchmaker	B2B	B2C	Omnichannel approach
Traditional	<ul style="list-style-type: none"> <li>• Fairs</li> <li>• Meetings</li> <li>• Tastings</li> <li>• Samples</li> </ul>	<ul style="list-style-type: none"> <li>• Agents/Distributors/Brokers</li> <li>• Tastings</li> <li>• Meetings</li> <li>• Training in field</li> </ul>	<ul style="list-style-type: none"> <li>• Wine shop</li> <li>• Wine tourism</li> </ul>	
Digital & Online	<ul style="list-style-type: none"> <li>• Conference call</li> <li>• Digital presentation</li> <li>• Email</li> <li>• Videos</li> <li>• Website &amp; social media</li> </ul>	<ul style="list-style-type: none"> <li>• Email</li> <li>• Website &amp; social media</li> <li>• Digital tastings</li> <li>• Online training</li> </ul>	<ul style="list-style-type: none"> <li>• Owned online shop</li> <li>• Social media</li> <li>• Website</li> <li>• Third-party online shop</li> <li>• Marketplace</li> </ul>	

Figure 2 - Overview of the case findings (Source: our compilation)

## 5. Discussion

The present study makes several contributions to the extant literature (See Table 2 for the summary) through its Alpha case study findings. Despite the scenario resulting from the outbreak of COVID-19, Alpha has continued to develop its global sales. However, while developing its global presence, the winery's local sales dropped precipitously following the first lockdown imposed by policymakers in March of 2020. Small wineries suddenly found themselves facing the closure of the Ho.Re.Ca. channel and the substantial reduction of wine shop direct sales. The latter was also impacted by the significant decrease in international tourists, resulting in missed revenues for wineries. A significant percentage of Alpha's direct sales depended on consumers who bought from the winery shop; most were foreign tourists (Mancino & Lo Presti, 2012). However, thanks to the previous years' efforts in developing business relationships with several partners worldwide, Alpha was not dependent on just a few distribution channels; but it was prepared and able to face the crisis that followed the outbreak (Del Rey & Piccoli, 2020), albeit not without some struggles. For wineries in general, the only physical channel that could generate positive results during the pandemic were the large retail ones, which remained open during the lockdown because of their role in providing necessity goods. Unfortunately, Alpha had not developed relationships with retailers due to their purchasing logic (PTV, 2012; Pomarici et al., 2012). The owner explained:

*"The large retailers channel is not used because it has economic-financial logics that are considerably distant from the company."*

Thus, small wineries like Alpha had to continue to do business during the COVID-19 pandemic without their most important distribution channel, Ho.Re.Ca. They attempted to replace it by relying on home deliveries and online channels. These only partially compensated for the wiping out of the Ho.Re.Ca. channel (Del Rey & Piccoli, 2020) but allowed them to survive during the pandemic. As demonstrated in the case, the multiple relationships with global distributors supported firms pivoting towards alternative distribution channels and helped to ensure business continuity. It bears noting that developing and implementing online channels, especially building an owned online sales platform, is not a simple task for small wineries. As underscored by Mozas et al. (2016), a company website demands a solid commitment and resources to achieve the desired results. An online channel requires high investments in time, human, and financial resources geared toward innovation (Laroche et al., 2013) and significant coordination efforts with several external partners. However, small winer-

ies that faced the first lockdown without an online channel in place were unprepared and they struggled to fill the distribution gap. As emphasised by the Alpha Winery owner:

*“There is a need for a strong evolution towards online sales, which allows a direct channel with consumers in any future moment of crisis. Even abroad, it is recorded that those who already worked with e-commerce were ready for new challenges and continued to grow. These companies already had lean management models that allowed them to manage everything in the best possible way, even during times of greatest emergency. Just think that these actors are already asking for new vintages and are continuing to place orders without stopping.”*

As underscored by numerous scholars, online channels are viable options used to maintain and develop business relationships with distributors and customers and to increase awareness and loyalty among those (Louvieris et al., 2003; Bonn et al., 2016; Fernández et al., 2019; Saghir et al., 2017; Szolnoki et al., 2014). In fact, the present study suggests that online channels were vital during COVID-19 to support small wineries’ business continuity and allow them to grasp new opportunities. As the Alpha Winery owner noted:

*“Online and social channels are additional tools, they allow you to interact and communicate what you are doing with the younger generations, you can educate the consumers of tomorrow, it is especially valid for SMEs.”*

Aside from the COVID-19 crisis, online distribution and sales channels are seen as tools that are helpful in coping with new challenges (Fernández et al., 2019). COVID-19 has provided new impetus to small wineries – often reluctant and laggard – to move towards implementing structural changes to match the ongoing evolution of the wine distribution system (Sanchez-Recante et al., 2020). Therefore, in this perspective, it is probably the last call for small wineries to become digitalised and keep up with the rapidly evolving business context.

However, the good performance registered by Alpha during the pandemic did not depend only on online sales but also on the use of the online channel to maintain business relationships with international agents, distributors, and customers (Effendi et al., 2020). Online channels integrate and complement but do not substitute traditional offline channels. To manage complex situations, such as the COVID-19 pandemic, integration is key.

Alpha’s implementation of online channels was the fruit of the owner’s determination and vision and the special request of international distributors, particularly the American one (Pencarelli et al., 2020). In this respect, the study brought to light a further challenge toward implementing an on-

line channel for small wineries: propensity for innovation. Small wineries that are able to understand and even predict market trends are related to the propensity to adopt innovations in terms of distribution channels. On the contrary, unsuccessful wine firms present a sort of inability or unwillingness to adopt proper strategic marketing processes at the right time, failing to balance tradition and innovation (Rossi et al., 2012; Fiore, 2016; Casali et al., 2018). Moreover, in adopting innovative practices for distribution, the study pinpoints that small wineries and their partners might support each other in finding and developing new technologies. Thus, the Alpha case study shows that COVID-19 pushed all small wineries to embrace new distribution and communication means to overcome the crisis.

By developing new channels for distribution, Alpha winery's sales rose sharply. However, these results are also the outcome of the previous efforts made to build a well-established network of partners, particularly agents and distributors, with a robust, pre-crisis offline and online presence. Alpha continued to do business successfully, thanks to the diversity of its partners. As confirmed by a global market wine broker:

*"I think it is necessary to diversify the commercial partners in order not to rely on a few national partners, but to work more and more on interacting with many actors around the world. [One must] Be leaner and make sure that if a channel doesn't work the business isn't totally dried up. Greater flexibility must also develop towards implementing alternative distribution strategies, such as online and temporary shops, to regain capillarity and the ability to reach the final consumer."*

To sum up, Alpha's strong collaboration with multiple partners allowed the firm to grow its business even abroad, during COVID-19, by taking advantage of the different policies adopted by various countries. Alpha has been able to exploit its relationship with agents, which, according to the literature, represent strategic partners helping small wineries to overcome the typical issues affecting SMEs in terms of lack of human, financial, and informational resources (Mora & Akhter, 2012). Alpha's partnership with agents has allowed the firm to access foreign markets, thus following the basic recipe for success in the long run (Escobar & Gil, 2016; Kung, 2007). In the words of a global market wine broker:

*"For the business, agents have a fundamental value because they have allowed the company to enter markets that are difficult to manage."*

Managing the integration and combination of different distribution channels was the fundamental point that made the difference for Alpha. Every channel is integrated and coordinated to avoid cannibalisation, cross-channel conflicts, and useless overlapping (Sharma & Mehrota, 2007; Neslin et al., 2006).

Nevertheless, although the firm increased online activity through owned and third-party platforms (mainly websites and social media), the shift to an omnichannel approach does not appear to have been fully achieved by Alpha (Effendi et al., 2020). Our study underscores the complexities of implementing an omnichannel approach (Chen et al., 2018; Melacini et al., 2018; Mishra, 2020), pointing to lack of control over the considerable number of actors and partners that are participating in the whole distribution activity, in both traditional and online channels. Moreover, the uncertain times and the lack of human and technical resources (Pencarelli et al., 2020) seem to make it more feasible for small wineries to adopt a multichannel approach to managing their distribution strategy, which will then pave the way to an omnichannel approach and increase their proximity to final customers.

*Table 2 - Market makers and matchmakers literature contribution summary (Source: our elaboration)*

Topic	Actors involved	Related literature background	Literature Contribution
Business relationship with market makers and matchmakers	Market makers & Matchmakers	Rosenbloom, 1978; Baritau et al., 2006; Thach & Olsen, 2006; Mora & Akhter, 2012; Pomarici et al., 2012; Escobar & Gil, 2016; Moral et al., 2015; Fernández et al., 2019; Coyne, 2020; Kumar & Ayedee, 2021	Robust business relationships allow to overcome the crisis and have paramount importance for small resilience. Online channels provided new impetus to manage and develop business relationships during the pandemic.
Small winery Innovation pushed by matchmakers and market makers	Market makers & Matchmakers	Presenza et al., 2017; Casali et al., 2018; Canavati et al., 2020; Pomarici, 2021	Matchmakers and market makers guide small wineries to innovate and embrace new distributive practices.
Innovation propensity of matchmakers and market makers	Market makers & Matchmakers	Baritau et al., 2006; Thach & Olsen, 2006; Presenza et al., 2017; Casali et al., 2018;	Innovative distribution partners supported small wineries to overcome the COVID-19 crisis. Partners supported small wineries in adopting a multichannel and omnichannel approach.
The adoption of a multichannel approach in crisis time	Market makers & Matchmakers	Rosenbloom, 2007; Sharma & Mehrota, 2007; Laupole & Colla, 2016; Neslin et al., 2006; Calderón et al., 2019.	The multichannel approach reduces the risk of single distribution channel dependency. Different channels need to be integrated and coordinated to exploit their potential.



The adoption of an omnichannel approach in crisis time.	Market makers & Matchmakers	Cook, 2014; Verhoef et al., 2015; Picot-Coupey et al., 2016; Saghiri et al., 2017; Cao & Lin, 2018; Chen et al., 2018; Jocevski et al., 2019; Mishra, 2020; Solanelles et al., 2021; Ailawady & Farris, 2017;	The omnichannel approach supports small wineries being resilient during crisis times. The omnichannel approach reduces efforts and distance to engage with new buyers and consumers and open new pathways.
Innovation propensity of the winery to develop the omnichannel approach	Market makers & Matchmakers	Rossi et al., 2012; Presenza et al., 2017; Casali et al., 2018; Kumar & Ayedee, 2020; Canavati et al., 2020;	Wine firms should push their partners to adopt an omnichannel approach, paramount in crisis time.
Small wine firms and GDO: opportunities in crisis time?	B2B wine distribution channels	Pomarici et al., 2012; PTV, 2012.	Small wineries production does not meet GDO purchasing logic even in adverse scenarios.
The irreplaceability of the Ho.Re.Ca. channel for small wineries	B2B wine distribution channels	Hall & Mitchell, 2008; Velikova et al., 2019; Canavati et al., 2020; Del Rey & Piccoli 2020.	The Ho.Re.Ca. channel is still the primary outlet for small wineries. Online channels and home deliveries could only partially replace this channel during crisis time.

## 5.1 Managerial implications

The case study also presents relevant practical implications (See Table 3). The COVID-19 crisis challenged small wineries to recognise and manage new distribution channels and implement strategies to reach their final consumers.

The study highlights the since ever central role of business relationships with all the distribution channels' actors. Small wineries are now, more than ever, called to design distribution strategies to support the business's continuity even in a worst-case scenario, such as the COVID-19 outbreak. Such exogenous shocks could become recurring ones, and from now onwards, firms must be ready with different backup plans in terms of distribution channel management (McKinsey, 2020). Thus, establishing robust relationships is the means to navigate through those hard times. The present study also emphasises that the strategies mentioned should be developed with the consumers in mind. Differences between urban and rural areas as well as between online and offline channels are noteworthy, as they are also related to market makers and matchmakers' selection and engagement. When engaging with new partners for distribution, the small winery should integrate the new potential partners with those from pre-existing relationships and channels.

Firms are also called to engage with new partners to manage their online presence, which entails both communication and distribution channel development. The online presence, and the partners engaged, should work side-by-side with pre-existing partners operating in the traditional distribution channels. To realise the omnichannel approach, the firm needs to integrate traditional and digital distribution channels by fostering multi-actor teamwork, which would involve all the different stakeholders, for example. The present study's authors maintain that managing the integration between traditional and digital distribution channels is paramount, allowing wineries to do business in adverse conditions and even providing further competitive advantages in the long haul to develop a consistent global presence.

COVID-19 highlighted the importance of online channels. Small wineries, which usually lag behind innovation, are called to embrace online channels in terms of distribution. For these reasons, the innovative propensity of small wineries and all the actors of the different distribution channels should be combined and with reciprocal influence to support the adoption of new means to reach final consumers. However, the nature of the product also calls to develop a tangible distribution channel strategy. Indeed, when making distribution management decisions, small wineries should consider an omnichannel approach, given the flexibility it offers. The nature of the product also calls for a tangible distribution channel strategy.

Also, according to consumers, adopting an omnichannel approach means that the same customer segment might be reached through different channels. Potentially, conflicts and cannibalisation could take place; therefore, firms are thus urged to strategise to minimise those conflicts and manage cross-channel integration to create value for all the stakeholders involved.

Proximity as last-mile delivery should be increasingly considered when developing omnichannel strategies. As mentioned above, the tangible nature of the product requires small wineries to manage new distribution channels to reach final consumers. Different set-ups should be developed according to the area involved (e.g. urban versus rural) to be effective and convenient.

In terms of physical distribution channels, the study provides enough evidence in line with previous studies to confirm that large retail chains (GDO) still are a non-viable distribution channel for a small winery. Small wineries should develop strategies that do not consider this important yet demanding actor for the reasons mentioned in the research, such as their negotiating power and the volume needed. At the same time, however, the Ho.Re.Ca. channel should not be the only distribution channel small wineries rely on for their distribution. The study suggests that the small winery should develop new channels and business relationships to create alternative viable distribution means to reach final consumers worldwide.

In the development of new distribution channels, the role of digital technologies is increasing and becoming popular both for the engagement with B2B and consumers.

*Table 3 – Managerial implications of small winery distribution channels during crises (Source: our elaboration)*

<b>Topic</b>	<b>Actors involved</b>	<b>Recommendation</b>
The business relationship with market makers and matchmakers	Market makers & Matchmakers	The study highlights the since ever central role of business relationships with all the distribution channels' actors.
Small winery Innovation pushed by matchmakers and market makers; Innovation propensity of matchmakers and market makers; Innovation propensity of the winery to develop the omnichannel approach during crises	Market makers & Matchmakers	The innovative propensity of small wineries and all the actors of the different distribution channels should be reciprocally influenced to embrace new means to reach final consumers.
The adoption of a multichannel approach in a crisis scenario	Market makers & Matchmakers	When engaging with new partners for distribution, the small winery should merge and integrate the new potential partners with pre-existing relationships and channels.
The adoption of an omnichannel approach in crisis time.	Market makers & Matchmakers	Small wineries are now more than ever called to design distribution strategies to support the business's continuity even in the worst cases, such as the COVID-19 outbreak.
Small wine firms and GDO: opportunities in crisis time?	B2B wine distribution channels	Small wineries have to focus on developing alternative channels instead of GDO until they reach a minimum level of negotiating power to deal with larger distribution channels alone.
The irreplaceability of the Ho.Re.Ca. channel for small wineries	B2B wine distribution channels	The Ho.Re.Ca. small wineries should not consider channel as the only viable distribution channel. The risks of being dependent only on one channel are the most critical for small wineries.

## 6. Conclusion

The Covid-19 pandemic caused a breakthrough of traditional distribution channels. Since the end of 2020, the economy has been in recovery, although it has not reached pre-Covid levels yet. One of the most impacted sectors of the economy was wineries due to the lockdown and the closure of the Ho.Re. Ca. distribution channel following policymakers' regulations. Covid-19 provoked an unprecedented and unforeseen disruption in small wineries.

The present paper contributes to wine marketing and distribution channel management literature by addressing the two research questions outlined above. The findings support the value-added contributions of this study, as summarised below.

To answer the first research question, *How have small wineries' distribution channels been challenged during COVID-19?*, having different distribution channels has required the development of several business relationships. Accordingly, market makers and matchmakers have become increasingly strategic to build a strong presence within distribution channels. In terms of distribution channel management, while large retailers are still out of sight for small wineries, the study confirms that Ho.Re.Ca. is still the most valuable distribution channel. However, the study also shed light on the fragility and potential risks of relying on this channel alone. COVID-19 and the ensuing lockdowns created painful consequences for all the small wineries that had entrusted their distribution only to the Ho.Re.Ca. channel. Diversification of distribution channels has become increasingly vital in order for SMEs like small wineries to avoid the pitfalls of depending on too few players, which could have dramatic consequences during crises.

In answer to the second research question, *How can the omnichannel approach support small wineries' distribution channel management during times of crisis?*, our study shed light on the benefits of developing an omnichannel approach. Small wineries are urged to identify a new range of partners, and not only among market makers and matchmakers, to support their omnichannel expansion. The authors argue that the omnichannel approach has become increasingly crucial, helping to develop partnerships with market makers and matchmakers to reach B2B and B2C buyers. In fact, during the pandemic when the whole world was in lockdown, maintaining business relationships with pre-existing and creating new ones with new partners was possible thanks to the adoption of online tools, such as those highlighted in the Alpha case analysed in the study: video conferences, online tastings, websites, emails, e-commerce platforms, and social media. Our study underscores that the adoption – full or partial – of an omnichannel approach helps the firm increase its resilience to crises. In particular, it develops the firm's capacity to manage its distribution channels and support the integration between the traditional and digital distribution channels. Resilience is built and achieved when the firm overcomes difficulties and continues to engage with customers during crises, such as COVID-19 lockdowns. However, such an integration of different distribution channels could have several drawbacks, such as the potential for cross-channel conflicts and cross-channel customer cannibalisation. Specifically, in the case of small Italian wineries, findings of the study undertaken show that adopting an omnichannel approach is still linked to the owner's innovation propensity. As demonstrated in the Alpha case, small wineries

are aware of the potential opportunities of pursuing an omnichannel approach, but they have not yet managed to achieve implementation. Even though these firms have been encouraged by their partners to innovate, they are still lagging behind in digitalising their distribution channels and adopting an omnichannel approach.

The authors of this study hold that online marketing activities are now mandatory for small wineries. Online activities support small wineries in creating and developing relationships with local and global business partners and reaching the final consumers worldwide. To reach the final consumers through online channels, the study suggests that small wineries should adopt two approaches: creating and developing a proprietary channel or creating a business relationship with one or more online retailers that will be in charge of promoting, selling, and delivering the product to the final consumers. These two approaches might also be launched concurrently if their integration is managed and the small winery is aware that potential conflicts are just around the corner. The study also points out that rural areas are still difficult to reach via online distribution channels; thus, small wineries located in those contexts should develop alternative means to overcome these barriers.

## *6.2 Limitations and further studies*

We acknowledge that the study is not without limitations. Firstly, the study is explorative in nature, as it adopts a qualitative single case and context methodology (Yin, 2014). Furthermore, the study is circumscribed to a specific region of Italy and a specific industrial context.

Future research avenues might be developed to understand how the pandemic-related challenges of wine distribution are unfolding in different countries. Moreover, further studies should be conducted when the pandemic is over to understand how firms have changed their distribution strategies and managed those changes. In addition, multiple case methodology should be considered to compare different cases from different countries or compare small versus large wineries to highlight potential differences and similarities. In addition, further research could deepen understanding of the role played by sustainability in the wine sector, particularly during crises. Finally, a quantitative analysis of the pandemic phenomenon might provide a comprehensive view of how small wineries manage and survive such difficult times.

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## **Empirical evidence and secondary data**

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