Lausanne 2024 Abstract Submission

Title
An Exploratory Study of the Greek Wine Industry

I want to submit an abstract for:
Conference Presentation

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Keywords
Greek wine industry; exports; national marketing strategy

Research Question
Are Greek wineries following the national marketing strategy more successful in export markets?

Methods
We use a representative new firm level dataset of the Greek wine industry where 132 wineries responded 137 questions to identify clusters of Greek wineries characterised by common attributes.

Results
The characteristics promoted by the national marketing strategy have a significant positive impact on the export performance of wineries exhibiting these characteristics.

Abstract
Even though Greece has one of the oldest wine making traditions in the world, the development of the modern Greek wine industry is a much more recent event triggered by the accession of Greece to the European Economic Community in the early 1980s. Greek wines eventually emerged on the international wine scene but it was the Greek financial crisis of the late 2000s that created a new necessity for Greek winemakers to turn their attention to the export markets. A national marketing strategy was commissioned to update the brand image of Greek wine abroad and to increase the volume and value of Greek wine exports. This exploratory study, which is based on a representative, up-to-date dataset gathered through a comprehensive online survey, seeks to explore the dimensions of the contemporary Greek wine industry and to identify clusters of Greek wineries characterised by common attributes. The resulting classification of Greek wineries is analysed to determine the specific attributes associated with successful export performance, to assess the evidence for the effectiveness of the national marketing strategy and to provide practical recommendations for Greek wineries on how to increase the odds of export success. Our analysis identify 5 clusters of Greek wineries. The typical winery in Cluster 1 is a small-scale winery that produces premium wines following organic methods. It is
guided by quality considerations and enjoys considerable export success. The more frequent attributes in Cluster 1 are all on-brand which is consistent with the champion export performance. The typical winery in Cluster 2 produces premium wines from local varieties following traditional methods. It is primarily motivated by tradition. The more frequent attributes in Cluster 2 are also all on-brand, but wineries in this cluster are not more likely to be regular exporters or export champions. Therefore, the export performance of wineries in this cluster is differentiated by other factors which have not been considered in the current study. The typical winery in Cluster 3 has achieved scale producing value wines from local varieties following conventional methods. It is guided by quality considerations and enjoys similar export success as the typical Cluster 1 winery. The more frequent attributes in Cluster 3 are a mixture of on-brand and off-brand attributes. This suggests that the interplay between the variables is important in determining export success. The typical winery in Cluster 4 has grown into a medium-sized operation producing wines with a significant proportion of international varieties which are regularly exported. The more frequent attributes in Cluster 4 are again a mixture of on-brand and off-brand attributes, albeit different than in Cluster 3, leading to a different but still successful export outcome. The typical winery in Cluster 5 produces value wines with a significant proportion of international varieties following conventional methods. It is driven by cost considerations and most of its wines are sold in the domestic market. The most frequent attributes in Cluster 5 are all off-brand which is consistent with the marginal export performance.

In summary, the export success of the typical on-brand Cluster 1 winery and the lack of export success of the typical off-brand Cluster 5 winery reinforces the effectiveness of the national marketing strategy. However, achieving export success is more differentiated than simply being on-brand as evidenced by the export performance of typical Cluster 3 and Cluster 4 wineries, which exhibit a mixture of on-brand and off-brand attributes. Conversely, exhibiting the right on-brand attributes is not a guarantee of export success as seen by the varying export performance of Cluster 2 wineries.

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