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THE PERCEPTION OF ROMANIA AS A WINE PRODUCING COUNTRY – A PERSPECTIVE OF INTERNATIONAL WINE SPECIALISTS

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Abstract

On an increasingly competitive world wine market, faced with the decrease in consumption, the orientation of consumers (especially younger ones) towards other types of drinks and overproduction, the battle between the wine producing countries is more intense than ever. The vast majority of these countries have understood the need to support their wine-producing industries, and this support is manifested at all levels, including development and implementation of strategic, marketing and sectoral branding programs. A common element of these efforts is the need for differentiation, both at the offer and communication level. This differentiation (necessary at the industry, producer and brand level) has the role of improving or changing the perception of consumers towards a certain product, producer or even the country of origin and giving them reasons to purchase the respective product. In order to be successful, Romania and its wine-producing industry must rally behind this quasi-generalized approach. Starting from the premise that any strategic differentiation effort at the marketing and branding level must be preceded by an accurate understanding of the existing situation, the purpose of this paper based on qualitative research, is to support the evaluation of the current situation by identifying the perception of foreign wine specialists regarding Romania as a wine-producing country. This perception was investigated on several levels, such as those related to awareness, image, attributes, benefits and attitudes associated with Romania as a wine-producing country. The main results indicated that Romania ranks in the top 3 of Eastern Europe in terms of aided awareness as a wine-producing country, but there is low recognition of its indigenous grape varieties, with 70.4% of respondents unfamiliar with them. The study also found that perceptions of Romanian wine's attributes, such as price and quality, are unclear, with a notable portion of respondents undecided, so Romania requires a strong branding strategy to boost its international market presence and to enhance the perceived value of its wine products.

Key words: *brand awareness, brand image, differentiation, perception of Romania as a wine producing country*

INTRODUCTION

Strategy has been defined and understood as the process by which an organization couples its internal resources and abilities with the opportunities and risks present in its external economic environment. This approach is perhaps best illustrated by Porter [15], which focused on the analysis of industry structure and competitive advantage [6]. Competitive advantage is the potential of an organization evaluated in relation to its competitors. According to Porter [15], the sustainability of a competitive advantage is determined by five factors that characterize an industry, namely: the threat of new entrants, the threat of substitute products, the bargaining power of buyers, the bargaining power of suppliers and the rivalry among existing competitors.
In a development and update of what was stated by Porter and McGarth [15], [11] claims that the competitive advantage has never been really sustainable in the long term, and even less so today. In the dynamic world in which we live, the competitive advantage is fleeting, and the continuous change of strategy is a necessary condition to achieve the organization's objectives [11]. The same author is of the opinion that success-oriented organizations must develop dynamic competitive advantages, with which to cope in this world of changes, and in order to obtain them, openness and vigilance are necessary for the planning process to be continuous.

In addition, McGarth [11] argues that the current economy is a creative one. This type of economy is based on a multitude of technological innovations that involve dramatic reductions in costs, size, time, and effort, new infrastructure systems, new ways of socializing, new meanings about how time is spent, and new ways of living these possibilities. In the creative economy, where the search for the next opportunity is a priority, "companies are becoming better at understanding what people really need, what they are willing to pay more for in order to design better experiences, and at achieving increased efficiency from existing assets" [5].

The most profitable strategies are based on differentiation, offering customers something they value and that competitors don't have [10]. All goods and services can be differentiated [9]. The author states that differentiation is most visible in branded packaged consumer goods, in design, in the composition of industrial goods, or in the features of intangible goods. Equally, differentiation can manifest in the way the business is operated or in the way the marketing process is managed. An organization can also differentiate itself through the way it interacts with its customers. A creative attitude and thinking, oriented towards the customer, allows organizations to position their offerings in ways that neither they nor their competitors would have ever imagined [10].

Product differentiation is primarily a matter of customer perception, the image they form about a product or service, and organizations have many means at their disposal to influence the formation of this image, of this perception. In its most direct understanding, perception is the value of a product or service seen through the eyes of customers. It represents the cumulated effect of interactions, experiences, and emotions associated with the product or service in question. Perception is not just about being different, but about being better in a way that is relevant to customers. A product must distinguish itself through its physical characteristics and equally must be perceived as having a unique value. Thus, perception plays a critical role in the success of a product, because more often than not, perception is stronger than reality, so building a strong brand with a high level of equity must take into account its image and perception [12].

Battistoni et al. [2] argue that brand equity is directly correlated with market share, purchase intentions and consumer preferences, price insensitivity, and product resilience in difficult situations. The authors argue that building brand equity can be achieved through various models, the most common being those based on a financial perspective or strategic brand management. The first perspective deals with the financial value that brands can generate for the organization, while the latter is based on market perceptions and consumer behaviours. Consumer-oriented approaches are generally preferred because they rely on information that comes from careful and detailed examination of customer opinions and preferences. Approaches from a financial perspective often ignore the customer's point of view and rely almost exclusively on indicators that are more or less objective and difficult to measure [2].

Among the most relevant models for building a strong brand with a high level of brand equity are those developed by Aaker [1] and Keller [8], both having consumer perception and brand image as their central pillar. Aaker [1] argues that the five categories of brand equity assets create value for both the customer and the company. These different categories of assets are: brand loyalty, brand awareness, perceived quality, brand associations, and other proprietary brand assets. Keller [8] develops the consumer-based brand equity model for a practical reason, namely to support an organization's management in efforts to build a strong brand. This model involves the following steps: (1) establishing the correct brand identity, i.e., establishing the breadth and depth of brand awareness, (2) creating appropriate meaning through strong, favourable, and unique brand associations, (3) generating positive reactions towards the brand, and (4) establishing brand relationships with customers, characterized by intense and active loyalty.

In their study that analyses the prominent determinants of consumer-based brand equity, Battistoni et al. [2] emphasize the importance of maintaining a good brand reputation over time. Such a reputation must be supported by the high quality of the products or services offered by a positive image. In addition, customers strongly desire brands that are emotionally consistent with their values, with whom they can dialogue and that attend to their feedback and needs.

In the specific case of wine brands, Dressler and Paunovic [4] mentioned that research is dominated by three major directions: identity, image, and wine brand personality. It is demonstrated once again that place, region, and country play a critical role in constructing a wine brand's identity [19], [7], [13]. Moreover, Muhonen et al. [14] and Saaksjarvi and Samiee [16] state in their research that the most important components of brand identity are values, vision, and brand positioning. There are researchers [18] who claim that in the specific case of sparkling wines, brand image is a significant factor in the purchasing decision and is influenced by expert reviews and recommendations, as well as by reputation, prestige, and equally by online reviews.

A critical observation made by Dressler and Paunovic [4] targets the specialized literature on wine brand personality, noting that it largely relies on the elements developed by Aaker [1]. This quasi-unilateral perspective may overlook recent developments as well as ignore other models, such as the one designed by Davies et al. [3]. Brand personality, its effects, and its dynamics are areas of intense research in the context of building a strong brand [4].

The purpose of this research is to assess and analyze the perception of Romania as a wine-producing country from the perspective of international wine specialists. The objectives include evaluating brand awareness, image, and attitudes towards Romania’s wine industry and understanding the level of recognition of Romanian wine brands and indigenous grape varieties. The study aims to provide insights for developing strategic marketing and branding efforts that can enhance Romania's position in the global wine market.

MATERIALS AND METHODS

The research methodology is based on the "honeycomb" model developed by Wilson [20]. From the perspective of research philosophy, the epistemological approach is interpretivist, while the ontological approach focuses on subjectivism [20]. The research follows an inductive process, and the adopted strategy is qualitative. The research is exploratory, and the research plan combines elements of action plan and case study. The data used is primary, and its interpretation is predominantly qualitative, also including elements of quantitative analysis [20].

The study was conducted from March 2 to 12, 2024, during the largest international wine fair, ProWein Düsseldorf. The information was collected through an online questionnaire, with email addresses gathered from the organizers' database. The questionnaire was sent to 1,684 participants, and 71 responses were received (a response rate of 4.22%). The questionnaire consisted of 13 questions, including 11 closed-ended questions (with single or multiple-choice answers) and 2 open-ended questions.

The first 3 questions of the questionnaire were aimed at identifying the respondents (gender identification, the main business activity of the company represented by the respondent and the geographical location of that company).

Questions 4 and 5 aimed to identify the awareness of wine-producing countries in Eastern Europe (including Romania). Question 4 sought to assess unaided awareness, asking respondents to mention only the first Eastern European wine-producing country that came to mind, which is similar to the top-of-mind unaided (brand) awareness metric. Question 5 was designed to identify the aided brand awareness metric (a list of the most important Eastern European countries was provided, and respondents were asked to name those they recognized as wine-producing countries).

Through questions 6-9, the aim was to delve deeper into the awareness of Romania as a wine-producing country. Q6 sought to identify to what extent Romania is recognized as being among the top 10 European wine-producing countries. Q7 aimed to determine the aided awareness of indigenous grape varieties used in wine production, while questions 8 and 9 sought to find out whether respondents had consumed Romanian wine in the last 3-6 months and if they recalled the brand of the wine consumed (awareness of Romanian wine brands).

Questions 10 and 11 (multiple-choice questions on a 5-point Likert scale) were structured to evaluate the attributes, benefits, and attitudes associated with the consumption of Romanian wine. Q12 aimed to highlight the general attitude towards Romania as a wine-producing country, while Q13 sought to understand how strong this general attitude is towards Romania as a wine-producing country.

RESULTS AND DISCUSSIONS

For the first question (*Q1 – Gender identification)*, 50 respondents identified as male (70.4%), 20 as female (28.2%), and only one person preferred not to disclose their gender (1.4%).

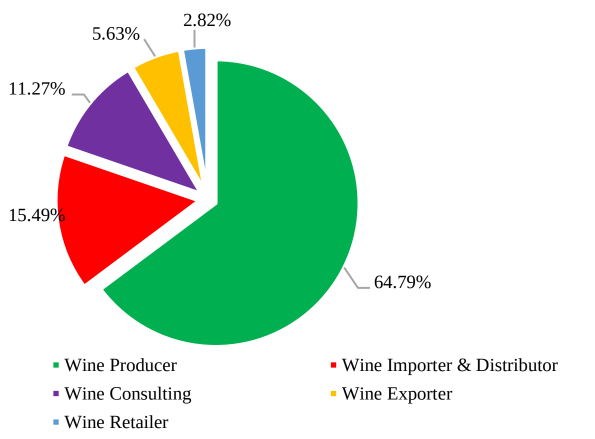

Fig.1. The main field of activity of the respondents' companies
Source: Own calculation.

Regarding the main field of activity of the company they represent (*Q2 – Your company's main field of activity*), 46 respondents come from wine-producing companies (64.6%), 11 represents wine importing and distributing companies (15.5%), 8 are from wine consultancy (11.3%), 4 from wine exporters (5.6%), and only 2 (2.8%) are from wine retailers (Fig.1).

In terms of the geographical region they come from (*Q3 – Company location*), 40 respondents (companies) are from Europe (56.3%), 10 of them are from North America (14.1%), and 9 are from South America (12.7%). The remaining geographical regions have a representation of less than 10% (Australia & New Zealand – 8.5%, Asia and Africa – 2.8% each, and the Middle East and Central America – 1.4% each).

Through *Q4 – What is the first wine-producing country from Eastern Europe that comes to mind?*, we aimed to evaluate unaided awareness (specifically, top-of-mind unaided awareness) of the wine-producing countries in Eastern Europe (Table 1).

Table 1. The top wine producing countries which come to mind

Crt. No.	Top wine producing countries which come to mind (Top of Mind - Unaided Awareness)	%	No of responses
1	Armenia	1.41%	1
2	Austria	1.41%	1
3	Bulgaria	9.86%	7
4	Croatia	2.82%	2
5	France	4.23%	3
6	Georgia	9.86%	7
7	Greece	8.45%	6
8	Hungary	12.68%	9
9	Italy	1.41%	1
10	Moldova	15.49%	11
11	Romania	8.45%	6
12	Slovenia	1.41%	1
13	None	22.54%	16
	Total responses		71

Source: Own calculation.

It is noteworthy that nearly a quarter of respondents (22.54%) could not name any wine-producing country from Eastern Europe, and 7.04% of them named countries from other areas of Europe (Austria, France, Italy). The most mentioned countries were Moldova (15.49%), Hungary (12.68%), Georgia and Bulgaria (9.86%). Romania received only 6 mentions (8.45%), 4 from Europe and 2 from

South America. It is surprising that for Romania there were no mentions from North America (where the United States is the largest wine market in the world) and none from Asia (where China is another major wine market).

Question *Q5 – Which of the following Eastern European countries do you know as wine-producing countries?* aimed to evaluate aided awareness regarding the wine-producing countries in Eastern Europe.

Table 2. Wine producing countries from Eastern Europe

Crt. No.	Wine producing countries from Eastern Europe (Aided Awareness)	%	No of responses
1	Bulgaria	77.46%	55
2	Croatia	70.42%	50
3	Georgia	90.14%	64
4	Moldova	92.96%	66
5	Romania	80.28%	57
6	Ukraine	30.99%	22
7	Serbia	25.35%	18
8	Slovenia	53.52%	38
	Total responses	71	

Source: Own calculation.

The top two positions are held by Moldova and Georgia (Table 2), with 66 and 64 responses, respectively. Romania ranks third, with 57 mentions (80.3% of total responses).

Table 3. Respondents' answers about Romania as a wine producing country

Crt. No.	Wine producing countries: Romania (Aided Awareness)	%	No of responses
1	Asia	1.41%	1
2	Australia & New Zeeland	7.04%	5
3	Central America	1.41%	1
4	Europe	46.48%	33
5	Middle East	1.41%	1
6	North America	11.27%	8
7	South America	11.27%	8
	Total responses		57

Source: Own calculation.

Of the 57 mentions of Romania, the majority come from Europe (46.5%), while South America and North America each contributed 11.3%. No responses were recorded from respondents in Africa (Table 3).

Romania is one of the most important wine-producing countries in Europe (ranked 6th in 2023 with 4.6 million hectolitres [17]), and *Q6 - Do you know that Romania is in the Top Ten European countries for wine production*? aimed to identify the level of awareness of this attribute associated with our country. 14 respondents (19.7%) were aware of this attribute of Romania's wine industry (Fig.2).

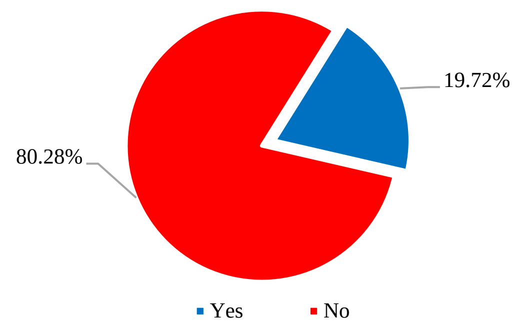

Fig. 2. Do you know that Romania is in the Top Ten European wine producing countries?
Source: Own calculation.

Among those who answered affirmatively to this question, 42.9% are from Europe, 21.4% from North America, and 21.4% from South America, and 14.3% from Australia & New Zealand.

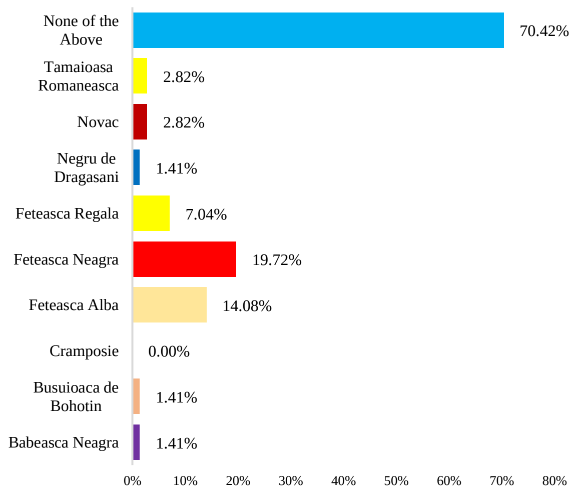

Fig. 3. Aided awareness of Romanian wine grapes
Source: Own calculation.

Another element investigated through *Q7 - Do you know any of the following varieties of Romanian grapes?* was the aided awareness of local grape varieties used in wine production. This question allowed for multiple responses, yet 50 respondents (70.4%) did not recognize any of the most important Romanian grape varieties used for winemaking.

Among the recognized varieties, Feteasca Neagră had the highest percentage (19.7%), followed by Feteasca Albă (14.08%) and Feteasca Regală (7.04%) (Fig.3).

In terms of the geography of recognition of native grape varieties, there were 15 responses from Europe (21.1% of total responses), with 7 recognitions for Feteasca Neagră, 5 for Feteasca Albă, 2 for Feteasca Regală, and 1 each for Busuioacă de Bohotin and Tămâioasă Românească. From North America, there were 3 responses (4.2% of total responses), with 2 recognitions for Feteasca Neagră, Feteasca Albă, and Feteasca Regală, and 1 recognition for Novac. From South America, there were 2 responses (2.8% of total responses), with 2 recognitions for Feteasca Albă and 1 each for Băbească Neagră, Feteasca Neagră, Feteasca Regală, Negru de Drăgășani, and Tămâioasă Românească. Additionally, there was 1 response from the Middle East (1.4% of total responses), with 1 recognition for Feteasca Neagră.

The questions *Q8 - Have you consumed a Romanian wine lately (3-6 months)?* and *Q9 - In case of an affirmative answer to Q8, do you remember the brand name of the wine?* were correlated in the sense that it aimed to find out whether respondents had consumed Romanian wine recently (in the last 3-6 months) and, in the case of an affirmative answer, if they could recall the brand name of the wine. In question 8, only 22 respondents (31%) stated that they had consumed Romanian wine during the specified period (with 18 responses from Europe and one each from North America, South America, Australia & New Zealand, and the Middle East). In question 9, out of the 22 who answered affirmatively to the previous question, only 3 (13.6%) could indicate the brand of wine (1 response for Davino, 1 response for Recas, and 1 for Purcari – which is a brand from a producer in Moldova). The mentions for Davino and Recas came from Europe, while the mention for Purcari came from Australia & New Zealand.

Question *Q10 - Please evaluate (not at all agree - totally agree) the following attributes of Romanian wine* aimed to understand the perception of foreign professionals regarding Romanian wine in relation to various attributes related to price, quality relative to price, the use of native grape varieties, and the quality of the distribution of Romanian wines in foreign markets (Fig. 4).

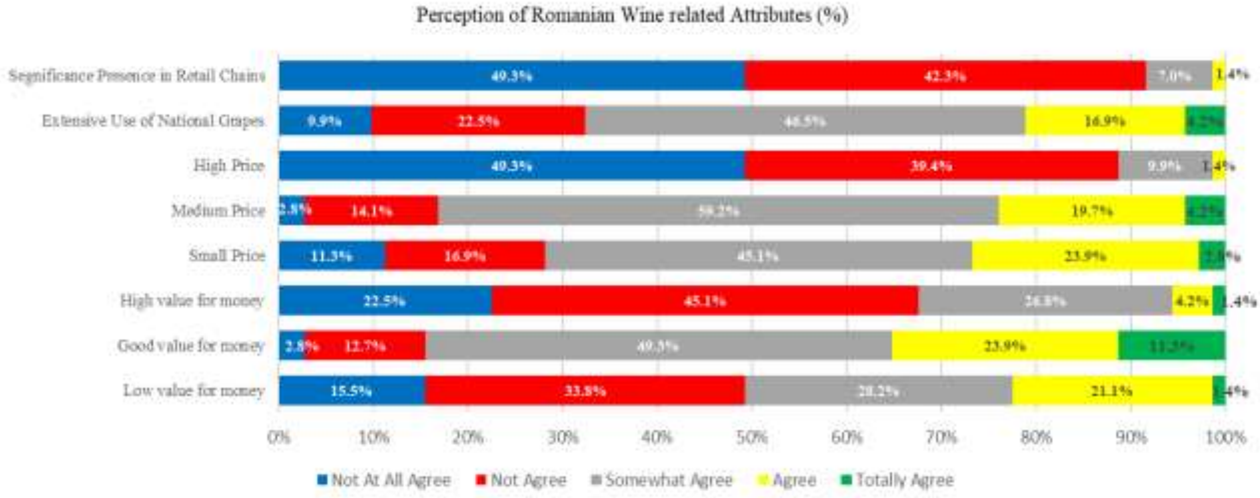

Fig. 4. Perception of Romanian wine related attributes
Source: Own calculation.

49.3% of respondents totally disagree or disagree with the attribute “Low value for money” while only 22.5% totally agree or agree with this attribute. For the attribute “Good value for money”, 15.5% of respondents totally disagree or disagree, and

35.2% totally agree or agree. It is noteworthy that there is a large percentage of undecided respondents ("somewhat agree"), nearly half of the total respondents (49.3%).

In relation to Romanian wine and the attribute "High value for money", 67.6% of respondents totally disagree or disagree with this statement, and 26.8% are undecided.

A particular situation arises with the attribute "Small price", where opinions are polarized (28.2% of respondents totally disagree or disagree, while 26.8% totally agree or agree). For the attribute "Medium price" 59.2% of respondents are practically undecided, while for "High price" 88.7% of respondents totally disagree or disagree with associating this attribute with Romanian wine. Additionally, for the attribute "Extensive use of national grapes," the percentage of undecided respondents is very high (46.5%), and for the attribute "Significant presence in retail chains," there is the highest percentage (91.5%) of those who totally disagree or disagree with associating this attribute with Romanian wine.

Through question *Q11 - Please evaluate (not at all agree - totally agree) the following statements about Romanian wine*, the aim was to understand the perspective of foreign producers regarding Romanian wine in relation to several statements (attributes, benefits and attitudes).

Regarding the first statement, which addresses the optimal price at which Romanian wine is sold in foreign markets, 28.2% of respondents totally agree or agree, but more than half (53.5%) are practically undecided. The situation of undecided respondents is similar for the statement related to the optimal quality of Romanian wine (56.3%), with only 22.5% believing that Romanian wine has optimal quality.

Concerning the statement about distribution ("Easy to find and buy"), 93% of respondents totally disagree or disagree with it. For the statements regarding the benefits associated with consuming Romanian wine ("It accompanies food/meals very well," "It offers moments of relaxation," and "Special sensory experience"), the number of respondents without a clear opinion is predominant.

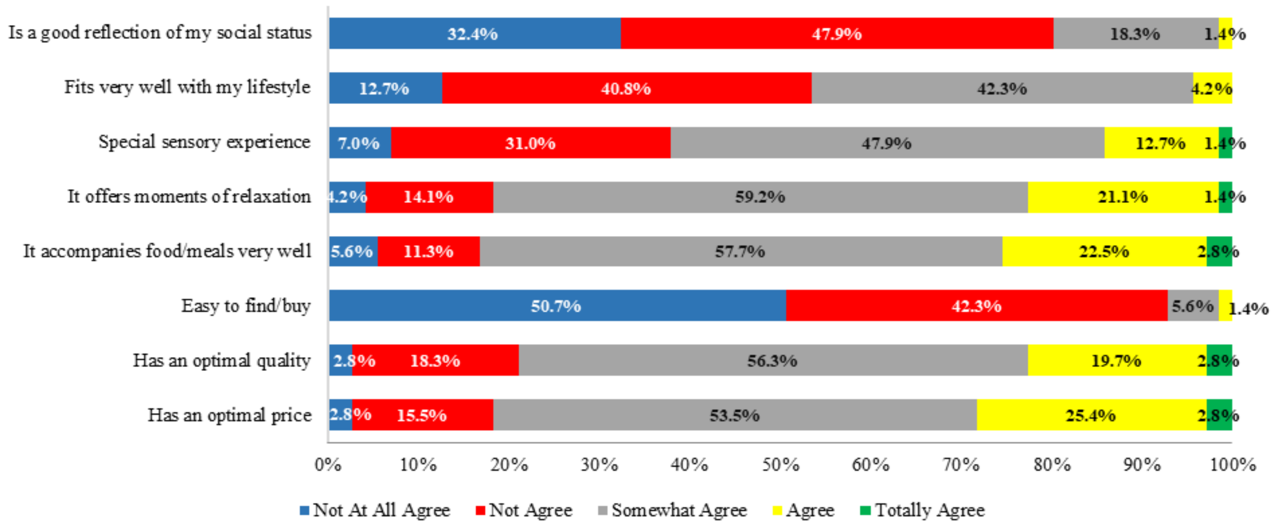

Fig. 5. Evaluation of statements about Romanian wine
Source: Own calculation.

In the case of statements addressing attitudes associated with Romanian wine ("Fits very well with my lifestyle" and "Is a good reflection of my social status"), those who totally disagree or disagree are in the majority: 53.5% and 80.3%, respectively (Fig. 5).

Regarding the general attitude towards Romanian wine (*Q12 - How would you describe your general attitude towards Romanian wine?*), the responses are polarized, with 28.2% of respondents having a favourable or very favourable attitude and 23.9% having an unfavourable or very unfavourable attitude (Fig.6). In this case as well, the percentage of those who do not have a clear, firm attitude is practically the majority (47.9%).

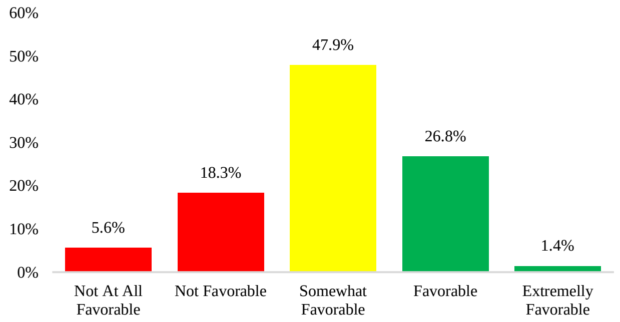

Fig. 6. General attitude towards Romanian wine
Source: Own calculation.

The last question of the questionnaire aimed to understand how strong the respondents' general attitude towards Romanian wine is (*Q13 – How strong is your general attitude towards Romanian wine?*). We sought to evaluate this to understand how challenging it will be to change this attitude in the near future. In this situation, the percentage of those whose attitude ranges from "somewhat strong" to "extremely strong" is very high (85.9%), which suggests that the process of changing this attitude will be rather difficult (Fig.7).

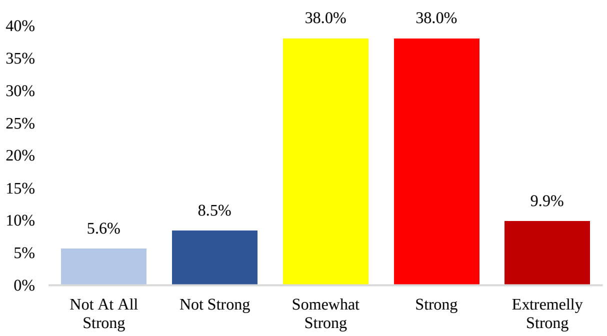

Fig. 7. The strength of general attitude towards Romanian wine
Source: Own calculation.

CONCLUSIONS

This article aims to provide, partial, how Romania is perceived as a wine-producing country by international specialists.

From the perspective of top-of-mind—unaided awareness of Eastern European wine-producing countries, Romania ranks fifth, following Moldova, Hungary, Georgia, and Bulgaria.

In terms of aided awareness, Romania holds the third position among wine-producing countries in Eastern Europe, behind Moldova and Georgia, with nearly half of the awareness coming from Europe and the rest predominantly from South and North America.

The study revealed low awareness of a major attribute associated with Romania as a wine-producing country: our country ranks 6th in Europe in terms of wine production but only 19.7% of respondents are aware of this fact.

Regarding the awareness of indigenous grape varieties used in wine production, 70.4% of those interviewed reported that they did not recognize any of these grape varieties.

Among the recognized varieties, Fetească Neagră, Fetească Albă and Fetească Regală received the most votes. Of those who consumed Romanian wine in the past 3-6 months (31% of respondents), only three could name the respective wine brands.

In the case of other attributes (price, perceived quality, distribution, and the use of local varieties in wine production), as well as benefits and attitudes towards Romanian wine, the perceptions of foreign professionals in the wine world are rather ambiguous and unclear, and when they are firm, they tend to be polarized.

In conclusion, in order to increase the volume and value of exports, Romania's wine industry needs a coherent and consistent marketing and communication program.

One of the first steps would be to create a sectoral brand which would help differentiate and position the wine industry in the international market.

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