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COMPARATIVE ANALYSIS OF WINE TOURISM IN MACEDONIA AND BULGARIA

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Abstract: Tourism as activity of people traveling to and staying in places outside their usual environment for leisure, business or other purposes is successful story of present time and has shown constant economic growth in past decades. The subject of this paper is comparative analysis of wine tourism in Macedonia and Bulgaria. Criteria for choosing these two countries are continental territory and candidate for accession to the European Union from Macedonia on the one hand, and membership in European Union and see border of Bulgaria on the other. The paper provides basic data for the two countries such as: population, number of international tourists, tourism and wine law, existence of a National Tourism Organization and promotion of wine tourism. Table showing government bodies responsible for tourism, national tourism development strategies concerning wine tourism is used to prepare a comparative analysis of two countries. For the purpose of this paper we use research methodology and secondary data sources by consulting official institutions and relevant literature of two countries. An analysis and review of selected documents has been made, based on systematical evaluation of their actual content. The paper concluding remarks are regarding the structure, differences and similarities of the wine regions and how the legislation and policy determine prospects and directions of wine tourism development in Macedonia and Bulgaria.

Keywords: wine tourism, wine regions, Macedonia, Bulgaria.

INTRODUCTION

According to the United Nations World Tourism Organization [1], the arrival of tourists in 2017 at the international level reached the number of 1.323 million. Tourist spending totaled 1.340 billion US dollars, and the tourist industry accounted for 10% of the global gross domestic product. Every tenth employee in the world is employed in this sector. Tourism will maintain its continuous and positive level of development of the last 60 years in the upcoming period. The projections are that the European continent, which Macedonia and Bulgaria are part of, will be firmly entrenched in the world tourism market in the years to come and it will be the main source of tourist offer, demand and movement of international tourists.

Tourism is characterized by its own specifics and various forms, such as rural tourism, adventure tourism, urban tourism, wine tourism etc. In addition to the large number of authors dealing with the topic of wine tourism, the literature does not recognize a universal and single definition of wine tourism [2]. This term has been explored by various authors and organizations, defining it from different perspectives. The first stage of the researches related to wine tourism date back to the 1990s [3]. Wine tourism is also called enotourism by some authors [4]. Other authors provide the synonyms oenotourisme or vinitourism for wine tourism [5]. However, each terminology and definition helps to understand the specificity of wine tourism which is the sum of various interactive processes, phenomena and relationships arising from the interest of the visitors for the production and/or the consumption of wine as a style, way of life, culture and tradition of a certain wine region [6]. The majority of the definitions for wine tourism refer to the experiences and the motives of the tourists. According to them, wine tourism means visiting wine regions, vineyards, tastings, wineries, wine festivals and exhibitions organized for purposes of leisure. Generally, there are three main holders of wine tourism: the wine producer, the tourist – consumer and the tourist agency promoting the destination. Other researches, in turn, point to the fact that the cultivation of vines and the winemaking technology are directly connected to the cultural heritage, with wine tourism having similar characteristics to cultural tourism, because the tourists participating in wine tourism and gastronomy are essentially participants in cultural tourism, as well.

The development of wine tourism leads to the development of the destination itself, and, in particular, the rural destinations, by increasing the wine sales, building a positive image of the destination and increasing the number of tourists. The development of wine tourism also depends on the tourism policy, the strategies and the development programs of the state, the destination marketing, the tourist organizations and the private sector. The following stakeholders of the tourism market benefit from the development of wine tourism [7]:

The Wine Industry through:

- increase in the wine sales,
- education of the visitors of the winery and the wine region,
- attracting new market segments,
- increased revenue,
- creation of new business cooperations,
- opportunities for creating new products.

The Destination through:

- increase in the number of tourists, their demand and consumption,
- development of a positive image of the destination,
- attracting new and retaining existing tourists.

The local community through:

- attracting new investments,
- development of new service and entertainment content,
- creation of a positive image of the region,
- organization of manifestations,
- employment of local population,
- general development of the region.

The demand in wine tourism consists of a number of different motives, experiences, perceptions and expectations that change depending on the needs of the potential consumers. The determination of the motives for participation in wine tourism and the profiling of wine tourists is a complex process [8]. The motives vary from buying a good wine to education on the way of production, enjoying walks in nature, getting to know the local food etc. Researches show that the average wine tourist is a college graduate at the age of 45-60 and is economically independent. His/her goal is not only to taste wine, but also to meet other people, their culture and history. The literature defines four types of wine tourists [7]:

- Professional, a person who knows oenology, discusses details and precisely determines the qualities of the wine.
- Impressed beginner, a person who loves wine, enjoys food, travels with friends.
- Bohemian, a person with a high purchasing power who realizes his/her social status through the wine, has basic knowledge, loves the famous brands.
- Alcoholic, a person who regularly visits wineries, drinks wine in great quantities, but does not enjoy it.

The wine tourism offer consists of a combination of wineries, wine routes, the destination as an attraction, its image, the cultural heritage, wine manifestations etc. [9]. However, wine, as the only products, is not enough to complete the offer, so developing other forms, such as rural tourism, religious tourism, cultural tourism etc. is also required. The wine tourism product in itself should contain elements from different holders and as such it can be placed on the market as a successful tourism story. The table below shows the typology of the wine tourism products [10].

Table 1. Typology of the wine tourism products

Typology of the Products	Description of the products
Wine Routes	Marking the wine regions for the purposes of visiting vineyards and wineries
Walk in the Vineyards	The marked itineraries allow the exploration of the vineyards through sightseeing and walks
Studying Oenology	Familiarization courses for marketing in wine tourism, culture, tradition and production technology
Wine Cellar Visits	Introduction to wine cellars and winemaking

Wine Museums	Monuments of culture representing world achievements in winemaking
Festivals and Events	Events for the preservation of the local tradition, wine promotion, improvement of the distribution and the production
Expert Presentations, Fairs, Tastings and Sales Activities	Presentation of wines for commercial purposes

Successful examples of the development of wine tourism can be found all over the world. In addition to the countries which are traditional wine producers, such as France, Spain, Italy, countries like Argentina, Australia, Chile, New Zealand and South Africa invest a lot of resources for the development of wine tourism. In South Africa, tourists visiting Cape Town are supposed to do the following two basic activities: visit the Table Mountain National Park with a funicular and visit some of the regional wine routes [11]. Napa Valley, the popular wine region in California, USA, is a region where only plums were produced in the past, however, today it has grown to be one of the most significant and most visited wine region in the world. The majority of the tourists enjoy the picturesque wine routes of Napa, the numerous wineries and restaurants. In addition to tasting wine and visiting wineries, Napa offers other wine-related tourist experiences: walks through the vineyards, traditional lunch on the mountains, rest and relaxation in the spa centers, playing golf for a wine prize, cycling around the vineyards, hot air balloon rides, visiting cultural manifestations, eco-tourism, voluntary wine auctions etc. Some wineries, as an additional activity to enrich the stay of the tourists, have created bird parks, places for picnic and barbecue, local historical heritage tours etc. [12].

The research data from the United Nations World Tourism Organization [13] point to an increased interest in wine tourism worldwide, which, in the developed wine countries, represents a great part of the income generated by the wineries.

Table 2. Number of tourists and wine tourism in selected countries for 2014

No.	Country	Number of tourists who are directly motivated to participate in wine tourism in millions
1	USA	15
2	France	10
3	Italy	5
4	Spain	2.1
5	Argentina	1.5

We can see in the table that most of the wine tourists are in the USA and France, and then follow Italy, Spain and Argentina. Wine routes or paths have been created in these countries that are visited by the tourists and whose goal is to introduce the visitors to the wine, but also to the characteristics of the region as natural and cultural heritage.

REVIEW OF THE BASIC DATA RELATED TO THE WINE TOURISM IN MACEDONIA AND BULGARIA

We can see from the basic tourist data on Macedonia and Bulgaria presented in Table 3 that, according to the number of citizens and the surface area of the territory, Bulgaria is somewhat more than four times bigger than Macedonia. According to the data on arrival of international tourists and their visits to both countries, Bulgaria is 16 times more visited by tourists than Macedonia. The number of sites included in the UNESCO world cultural heritage worldwide is 1052, out of which 814 are cultural, 203 are natural and 35 are combined, located at the territories of 165 countries. There are 9 such sites in Bulgaria and one in Macedonia - Natural and cultural heritage of the Ohrid region, accepted in 1979.

Table 3. Review of the basic data on wine tourism in Macedonia and Bulgaria

Data	Macedonia	Bulgaria
Citizens (000)	2,054	7,517
Surface Area in km ² (000)	25,713	110,994
Sites in UNESCO World Heritage List	1	9
Foreign Tourists (000) in 2017	631	8,883
VAT for Tourism %	5	9
Tourist Tax (EURO)	0,66	0,10-1,53
Beds in the Accommodation Facilities	73,168	328,264
Travel Agencies, Travel Agents and Tour Operators	596	3,942
Flag Carrier Airline	/	Bulgaria Air
Wine Law	Wine Law	Law on Wine and Alcoholic Beverages
Vineyard Surface Area in Hectares (000)	23	62
Wine Regions	3	5
Wine Production (Millions of Litres)	106	130
Wineries	77	260
Wine Routes	1	12
Wine Museums	1	4
Wine Tourism Guides	3	8

Source: UNWTO (2018) Tourism highlights, 2018 Edition. Madrid: UNWTO; UNESCO World heritage list; www.nsi.bg; www.stat.gov.mk; Ministry of economy – Register of travel agencies in Macedonia; National tourism register – Register of tour operators and travel agencies in Bulgaria.

Data related to the Value Added Tax (VAT) for tourism show that Bulgaria has VAT related to the tourist services of 9%, and Macedonia has lower VAT of 5%. As far as the stay fee or tourist tax is concerned, in Macedonia it is fixed, and in Bulgaria it varies depending on the municipalities and regions where it is realized. The accommodation capacity in Macedonia is somewhat more than four times smaller than the capacity in Bulgaria. The number of travel agencies is also six times lower in Macedonia compared to the number of travel agencies in Bulgaria. The flag carrier airline is taken as a criterion in the comparative analysis, because 55% of the international tourists use air traffic when travelling. From this aspect, Bulgaria has a flag carrier airline which reflects positively on the tourism, and Macedonia lacks such flag carrier airline.

Both countries have laws that regulate winemaking, and the vineyard surface area in Bulgaria is almost three times larger than the vineyard surface area in Macedonia. Bulgaria has five wine regions, and Macedonia has three. Wine production in Macedonia is 106 million litres, and in Bulgaria it is 130 million litres. In Macedonia, there are 77

wineries, and in Bulgaria there are 260 wineries. Regarding the wine museums, Macedonia has one wine museum, and Bulgaria has four museums dedicated to wine. In Macedonia there is one wine route - Tikves Wine Route and Bulgaria has 12 wine routes. Three wine and wine tourism guides have been published in Macedonia, and in Bulgaria there are eight guides for wine tourism in the country.

TOURISM POLICY AND NATIONAL STRATEGIES RELATED TO THE DEVELOPMENT OF WINE TOURISM IN MACEDONIA AND BULGARIA

Tourism as a branch in both countries falls within the competence of different ministries. In Bulgaria, as a developed tourism country, there is a special Ministry of Tourism. Tourism in Macedonia is managed by the Tourism and Hospitality Department within the Ministry of Economy.

Table 4. Government bodies responsible for development of the tourism policy in Macedonia and Bulgaria

	Government Bodies Responsible for Development of the Tourism Policy (official web page)	National Tourism Organisation (NTO)/agency (official web page)	Publication for Promotion of Wine Tourism
Macedonia	Ministry of Economy, Tourism and Hospitality Department (economy.gov.mk)	Agency for Promotion and Support of Tourism in Macedonia (tourismmacedonia.gov.mk)	Taste Macedonia: Food and Wine
Bulgaria	Ministry of Tourism (tourism.government.bg)	Tourism Organisation of Bulgaria (bulgariatravel.org)	Bulgarian Wine

Source: The official websites of the institutions

We note that both countries have established bodies that deal with the promotion of tourism. In Bulgaria, it is the Tourism Organisation of Bulgaria, and in Macedonia, it is the State Agency for Promotion and Support of Tourism. These bodies have created official websites and they also promote the tourism potentials of the country at international level, through promotional campaigns, fairs, printed, video and audio advertising material. In both countries, the institutions that promote tourism have prepared publications related to wine and the wine and food combination.

Table 5 contains a review of the strategies for tourism development in Macedonia and Bulgaria, in which we can note that both countries have prepared and adopted National Strategies for Tourism Development where certain types of tourism are emphasized as potential for development. These strategies are usually prepared for a period of several years.

Table 5. Review of the National Strategies for Tourism Development in Macedonia and Bulgaria and analysis of the wine tourism

	National Strategy for National Tourism Development	Wine Tourism
Macedonia	National Strategy for Tourism in the Republic of Macedonia 2016–2020	With the realization of the economic potential of wine tourism, the local wineries started to produce new tourism products in Macedonia (e.g. wine tasting, restaurants, guided tours). Currently, there are mostly one-day visit products, mainly due to the lack of accommodation facilities. There is a growing demand for wine tourism products, and the majority of the visitors are mostly domestic tourists.
Bulgaria	Strategy for Sustainable Tourism	Wine tourism is characterized by a modern specialized base which complies with the latest

	Development in Bulgaria 2014–2030	needs for wine tourism development, relatively good transport connection of the wineries, quality accommodation facilities in or near the wineries. This can be combined with various wine-related events, such as holidays, fairs, wine cellars, wine festivals etc. as well as celebrations, customs and rituals related to the tradition of the local population.
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Source: National Strategies for Tourism Development in Macedonia and Bulgaria

The two strategies reviewed include the mission and the vision for the level and the development of tourism in the future. The strategies have been developed by Ministries and experts in the field of tourism, education and non-governmental organizations. What is common about the two strategies is the inclusion of wine tourism as potential for development, wine tourism analysis and recommendations for further development of wine tourism in the two countries.

CONCLUSION

The paper includes a review and basic indicators for the development of tourism and wine tourism in Macedonia and Bulgaria, which is manifested through the work of the relevant bodies – Ministries under whose competence fall the development of tourism, the formation of the National Tourism Organizations and Agencies, drafting a National strategy for tourism development and tourism-related legislation, as well as the legislation related to wine.

Macedonia and Bulgaria have good natural and anthropogenic resources for tourism development and follow the modern trends in the international market. The research for the purposes of this paper, conducted through a comparative method showed that Macedonia and Bulgaria pay serious attention to the tourism industry, as well as the activities related to wine tourism. This conclusion is confirmed by the fact that both countries subject to the research have relevant state institutions that represent the tourism sector through their ministries and that directly participate in the creation of the tourism policy and legislation. In both countries, there are National organizations that take care of the tourism promotion and have adopted Strategies for tourism development that are in line with the current tourism needs of the international tourists. Wine tourism, as a specific form of tourism with a potential for development, is represented in both strategies. Both countries have appropriate tourism-related laws and regulations that, since the moment of their adoption, have undergone numerous changes for the purposes of their improvement and aimed at meeting the needs of the interested parties. In both countries there are laws governing winemaking.

The comparative research that was conducted for the needs of this paper provides the following data. The vineyard surface area in Bulgaria is almost three times larger than the vineyard surface area in Macedonia, resulting in a larger total territory of the country. Bulgaria has five wine regions, and Macedonia has three. Wine production in Macedonia is 106 million litres, and in Bulgaria it is 130 million litres. In Macedonia, there are 77 wineries, and in Bulgaria there are 260 wineries. Regarding the wine museums, Macedonia has one wine museum, and Bulgaria has four museums dedicated to wine. In Macedonia there is one wine route - Tikves Wine Route and Bulgaria has 12 wine routes, one for each month of the year. Three wine and wine tourism guides have been published in Macedonia, and in Bulgaria there are eight guides for wine tourism that present the wine potentials of the country to the domestic and foreign tourists.

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