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**TOURISM
IN FUNCTION OF DEVELOPMENT
OF THE REPUBLIC OF SERBIA**

Tourism product as a factor of competitiveness of
the Serbian economy and experiences of other countries



**THEMATIC
PROCEEDINGS**

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**UNIVERSITY OF KRAGUJEVAC
FACULTY OF HOTEL MANAGEMENT
AND TOURISM IN VRNJAČKA BANJA**



STANDARDISATION OF WINERIES AS ONE OF PRECONDITIONS FOR THE GROWTH OF WINE TOURISM¹

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Abstract

Wine tourism is a new branch of tourism which is also a fast growing one. In Serbia it is not quite recognised as a priority although it can generate numerous benefits for the tourism, economy and society in general. One of the methods to emphasize and explore its potential is to introduce categorisation of wineries as providers of tourism services. This paper analyses experience of other countries in this process, namely the case of Hungary and Croatia. It gives the overview of the market of wine producers in Serbia; it further addresses efforts done so far in this field, and gives a recommendation for future activities in this field.

Key words: *categorisation, wine tourism, winery, Serbia, wine route*

JEL classification: Z32

Introduction

Wine tourism as a discrete field of research is inchoate, yet there has been rapid development in this field since the mid-1990s all over the world (Carlsen, 2004). It has got numerous positive effects not only in terms of financial benefits and development of viticulture areas (Gilbert, 1992), but also in terms of influence on image and reputation of the wine region

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(Bruwer & Lesschaeve, 2012) and country, promoting its culture, history and civilisation's achievements as well (Demossier, 2011, Boyd, 2008).

The tourism is becoming an important economic branch of a large number of countries worldwide, and in some it has already become even the leading one (Cvijanovic & Mihajlovic, 2016). Figures related to the wine tourism worldwide are astonishing. According to Resonance Consultancy in their Resonance Report (2013), in 2007 US Travel Association estimated that 17%, or 27.3 million travellers, have engaged in "culinary or wine-related activities while travelling". The amount of expenditures on wine and other items while they are in a wine region is estimated at USD 3 billion. There is also another important impact of wine tourism on post-tour purchasing behaviour that is very important for economies of different countries (Mahony, 2006).

On the other hand, there is a number of open issues in development of wine tourism specially in emerging countries, including principles and concepts, critical factors (Getz & Brown, 2006), structural dimensions (Bruwer, 2003) standardisation, positioning (Williams, 2001), customer demands (Singh, 2016), market intelligence with the focus on wineries and destinations with potential to develop this market niche (Getz, 2000). Cambourne et al. (2000) state that there is a continuing lack of information and data regarding wine tourism impacts; the lack of data concerning the requirements of winery tourists as well as concern about the standardisation of the wine tourism product and standardisation of the offer as well. There is a number of challenges and opportunities of developing wine tourism in a small community and in developing countries (Var et al., 2006). One of the most important challenges is standardisation of the offer in wineries in specific wine regions. The main problem is development of standardisation system for the offer in wineries, in order to provide full scale contribution to tourist offer.

The goal of this paper is to provide analysis about importance level of the wine tourism in Serbia as developing country, as well as to suggest standardisation of the offer in wineries in Serbian wine regions as the powerful tool for improvement of wine tourism. Starting from the stated goal, the following hypotheses are stated:

H-1: Wine tourism in Serbia is a tourism product with particular importance.

H-2: Standardisation of the offer in wineries can contribute to wine tourism development.

The suggested approach should ensure the development of appropriate strategies for wineries and destinations in Serbia. In order to fulfil this goal the paper is structured in the following way: literature review, methodology, research and discussion and conclusion.

Literature review and theoretical background of standardisation of offer in wineries

On the horizon in the tourists interests nowadays there are new tourism forms, that bring unique experiences (Manila, 2012). According to Getz & Brown (2006), wine tourism is, simultaneously, a form of consumer behaviour, a strategy by which destinations develop and market wine-related attractions and imagery, and a marketing opportunity for wineries to educate, and to sell their products, directly to consumers. Cohen and Ben-Nun (2009) agree that wine tourism means visiting wineries and tasting wine as well as other experiences, such as visits to local destinations around the winery (Dodd, 1995). Grybovych et al., (2013) state that, apart from visiting wineries and purchasing wines, wine tourism also includes a unique experience in the wine region that includes the environment, culture, food and ambiance. Wine tourism is an important channel for attracting tourists and developing rural areas (Hall, 2005). This type of tourism is located outside city centres, so it has a positive effect on the economic development of rural areas which are involved in the production of wine (Marzo-Navarro, Pedraja-Iglesias, 2009).

It is clear that wine tourism could be important part of the tourist industry in each country (Boyne, 2003) and especially in developing countries such as Serbia, for which one of key strengths is good supply of authentic food and beverages (Cvijanovic et al., 2016). On the other hand, developing countries, and in this paper Serbia will be in the focus of the research, do not have appropriate legislation as well as the standardisation of the offer in wineries. In order to make appropriate analysis of the position of wine tourism in Serbia, the starting point should be legal framework. It has been analysed by studying the following documents:

1. **The Law on Tourism** (Ministry of economy and regional development of the Republic of Serbia, 2009) that is currently in force does not contain a single word on wine tourism.
2. **Strategy for the development of tourism of the Republic of Serbia for the period 2016 – 2025** (Ministry of trade, tourism and telecommunications of the Republic of Serbia, 2016): it does

acknowledge potential of wine tourism along with the gastronomic tourism on a worldwide scale.

3. **Register of Tourism** established by Serbian Business Registers Agency is repository of data and records on registered entities carrying out tourism sector activities. However, no activity related to wine tourism is registered.
4. **Official statistics** does not acknowledge wine tourism. Wineries are legal entities that are registered either in the form of Entrepreneur or in the form of Limited Liability Company with primary business code 1102 production of wine, or 0121 growing of grapes, and are registered in the official Register of Wine Producers.
5. **The Law on Wine** (Ministry of agriculture, forestry and water management of the Republic of Serbia, 2009) is actually the only official document that imposes a frame for wine tourism. In Article 46 it states the following: *”Wine producer can offer bulk table wine produced out of his own grapes to the end consumer within his own winery“*. In other words this means that wineries can host tourists and offer wine tasting and presentation of the winery and vineyards, which many of the wineries in Serbia do.
6. **Official portal** of the Touristic Organisation of Serbia <http://www.serbia.travel> does not have wine tourism on its presentation, e.g. in the form of activities offered, or wine routes in the destinations offered.

When making analysis of the potential of wine tourism, it is also important to state that the number of legal entities in wine industry amounts to 9% of all entities operating in tourism in Serbia (Table 1). We also have to take into account that wine industry is a fast growing one and that each year a dozen of new wineries is established. It represents a significant area of tourism industry out of scope of official statistics.

Table 1: *Wine industry in Serbia*

	Typical touristic businesses (as of 2013)	Wine industry (as of 2012)
Number of companies	4,079	369

Source: *Strategy for the development of tourism of the Republic of Serbia for the period 2016 – 2025, Wine Atlas*

According to the presented analysis, it is clear that framework for the development and support for wine tourism is still not sufficiently

developed in Serbia. However, there is wide area for improvement of the potential of wine tourism in Serbia. It is clear that standardisation of the wine offer is one of them.

Standardisation is the process of implementing and developing standards based on the consensus of different parties that include firms, users, interest groups, standards organisations and governments (Xie et al., 2016). The most spread method of standardisation in tourism industry (Appiah-Adu, 2000) is the standardisation of accommodation facilities, i.e. hotels. Other methods could be focused on quality (Casadesus, 2010), etc. The main purposes of categorisation are to (Vine, 1981):

- Provide comprehensive information on the pattern and total availability of accommodation,
- Ensure that each category of accommodation provides certain minimum standards,
- Ensure that comprehensive up-to-date statistical information is available, e.g. on tariffs and staff employment, and
- Ensure that tourists' accommodation meets acceptable standards of public safety (e.g. fire, hygiene, security etc.).

Standardisation in wine industry can address few issues: technological processes, health and sanitary issues and tourism offer. While the first two are related to exact and precise rules, whatever they are, the 3rd one is rather vague and ambiguous. It is a new practice even for well-developed wine regions, and also a new topic for theorists. According to Wine Route Common Chart (Villány- Siklós Wine Route, 2006), objectives of the standardisation are:

- Standardisation of wine road;
- Consumers' protection;
- Promotion of the protection of local features;
- Environmental protection;
- Development of a sustainable wine tourism system, and
- Sensibilisation of the Wine Roads promoters towards the ethical side of wine tourism and towards a more sustainable tourism.

In this article, the part that is related to the categorisation of wineries is realised with a case study of two regions, namely Hungarian Villany and Croatian Istria. The reason for choosing these two countries is not only that they are among quite few regions that implemented this system, but of their comparability with Serbia on many levels: they are situated in

Europe but not being famous wine regions like those in France or Italy; all three have tradition of viticulture and rich civilizational heritage, similar cultural values and mentality, similar climate and to a certain extent similar grape varieties.

Issues addressed in a case study are the following:

1. Who is the organiser of the winery ranking?
2. What are the entities included in the ranking system?
3. How is the grade given to a winery?
4. Is ranking mandatory?
5. What are the main criteria i.e. focus area or evaluators?
6. What is the visual presentation of the category?
7. What are the benefits for wineries and for tourism activity in the region?

Case 1: Hungary, Villany

1. The organiser of evaluation

Villany – Siklos Wine Route Association was formed in 1996. The association has realised a number of projects that built and strengthened image and potential of their wine region, including INTERREG III C project: VinTour – Integrated quality tourism development in rural areas, based on wine routes. Categorisation of wineries was introduced within this project.

2. Who is evaluated?

The subjects to evaluation are not only wineries but all entities that operate within wine route and whose activity is related to the needs of wine tourists. Therefore, system of categorisation was prepared for: Wineries and cellars; Producers of local products; Restaurants and catering facilities; Accommodation; Shops selling wines and local products; Tourism offices; Handicrafts businesses; Wine museums; Other wine route services (Wine Route Chart, 2006).

3. How is the grade given to a winery?

Criteria for categorisation are divided into two parts:

1. **General criteria obligatory for all entities:** accessibility, parking, infrastructure for disabled persons; public information (visible information on winery, its operation, wine route, price list, other entities in the neighbourhood, public transportation); hygiene; environment culture (design of the building, appeal of the whole

facility, usage of environment friendly materials and usage of renewable sources of energy); professionalism (hours of operation, communication with customers, languages spoken, trained staff).

2. **Specific criteria connected to the type of the entity** i.e. criteria for wineries are the following: professionalism (tasting room, equipment for wine tasting, availability of information about the wine, presentation of wines, cellar tour, varieties, bulk or bottled wine package, etc.) and additional services (vineyard tour, additional offer such as sales of local goods and crafts, conference room, swimming pool, family friendly content, etc.)

For each criteria/question, winery is given 1, 2 or 3 points. There are also some eliminatory criteria (e.g. if the winery does not have visible information on the company name and working hours). Grades are given in the form of one, two or three grapes, and the boards representing grade have to be positioned at the entrance of each winery.

4. *Is categorisation mandatory?*

Categorisation is not mandatory.

5. *Visual presentation of the grade*

Figure 1: *Example of category board in Villany-Siklos*



Source: *Authors' footage*

6. *Benefits for wineries and for the region*

For all entities who obtained a certain grade, association organises promotion and different types of education and training. Finally, the results of implementation of this system can be understood with the indicators of tourism activity in the town on Villany where positive effects of the wine route system of winery categorisation are the following: the number of establishments offering accommodation increased by 17% in the period 2010-2015, the number of bed-places increased by 57%, the number of tourist arrivals increased by 47% and

the number of overnight stays increased by 57% (Hungarian Central Statistical Office, 2015).

Case 2: Croatia, Istria

1. *The organiser of evaluation*

Peninsula on the North-West of Croatia, Istria, has got the system of winery categorisation of introduced by the regional tourism board.

2. *Who is evaluated?*

Istria Tourist Board set a separate system for wineries, separate system for restaurants, for olive oil producers and for honey producers. Therefore in the ranking of wineries, only wineries are taken into account.

3. *How is the grade given to a winery?*

Istrian system has got an approach to categorisation of wineries that is twofold:

1. Winery offer is analysed based on **predefined criteria**: quality wine production with focus on autochthonous varieties; availability in best Istrian restaurants, and especially abroad; media coverage both in the country and abroad – grades in foreign wine guides; quality protocol of treating guests, well developed plans and options of winery and vineyard visits; tasting room quality and equipment, sales point, knowledge of at least two foreign languages; own web presentation, email and social networks communication on a daily basis; architectural design of the winery, separated paths for visitors and for work processes; environment, green areas and parking; food offer option, VIP area.
2. International **opinion makers**, wine industry professionals, visit wineries and give their judgement.

The final grade is given based on both grades; it is given in the form of a symbol of a wine glass, and may take the following forms: traditional "konoba", good, very good, excellent.

4. *Is categorisation mandatory?*

Categorisation is not mandatory.

5. *Visual presentation of the grade (Figure 2 and 3)*

Figure 2: *Categories in Istria*

KRITERIJI OCJENJIVANJA CRITERI DI VALUTAZIONE EVALUATION CRITERIA BENOTUNGSKRITERIEN
 Izvrstan / Eccellente Excellent / Hervorragend
 Vrlodobar / Molto buono Very good / Sehr gut
 Dobar / Buono Good / Gut
 Tradicionalne istarske konobe Cantine tradizionali istriane Traditional Istrian wine cellars Traditionelle istrische Weinkellar

Source: *Istra Gourmet (2016)*

Figure 3: *An example of a grade in Istria*

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Source: *Istra Gourmet, 2016*

6. Benefits for wineries and for the region

Wineries can participate in joint promotional and educational activities. As far as effects of categorisations are concerned, they certainly should be a topic of a separate research.

In the presented analysis, it can be concluded that Serbia does not have a developed framework for support and development of wine tourism. The improvement of wine tourism could be performed on different levels; one of them being standardisation of winery offer. The standardisation approaches in Hungary and Croatia were presented. It is clear that both systems have similar approaches. These two systems were compared and contrasted through six points and it is clear that positive results could be used in the development of the system for other countries such as Serbia. On the other hand, it is clear that Serbia is missing the systematic approach in development of the frame. Here below we will suggest a frame for introducing such a system, based on the same principles analysed above:

1. The organiser of evaluation

The leader in this process should be the Tourism Organisation of Serbia.

2. Who is evaluated?

All commercial wineries should be evaluated in the first round.

3. How is the grade given to a winery?

Predefined strategic attributes and goals should be translated into ranking criteria.

4. Is categorisation mandatory?

Categorisation should not be mandatory.

5. Visual presentation of the grade

A team of graphic designers and arts historians should propose simple and symbolic visual presentation of the grade.

6. Benefits for wineries and for region

Benefits should relate mainly to promotion activities, and then to educational and other activities that can improve winery offer.

Methodology and research

Research approach for this study can be divided in two parts. First part is related to the Hypotheses 1 and is based on the analysis of the number and structure of wineries as the basis for the development of wine tourism in Serbia and tourism offer in Serbia as well. Second part is related to the categorisation of wineries, and presents the framework for introduction of offer standardisation in Serbian wineries. In this paper we will collect data from literature and other sources and provide statistical analysis of the gathered data.

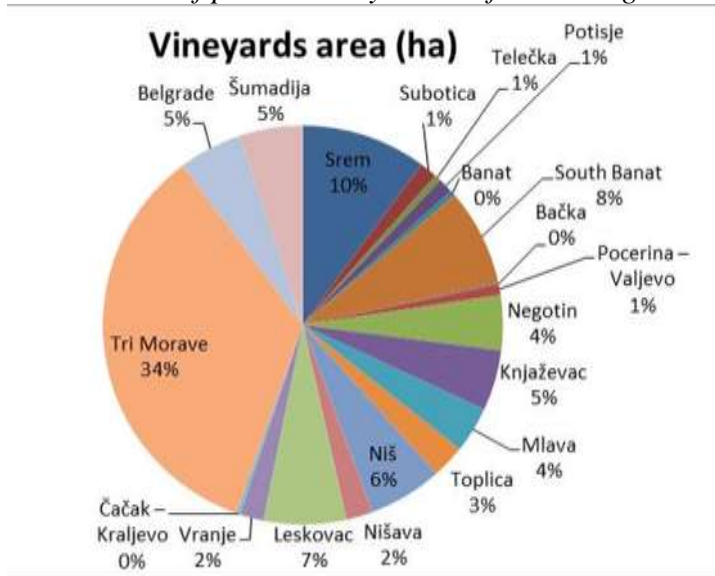
Vine-growing Serbia – Basis for Wine Tourism

It is very important to provide an answer to two questions: the number of wineries in Serbia as well as number of hectares of vineyards in Serbia and its distribution according to regions.

According to Agriculture census conducted in 2012 by the Ministry of Agriculture of the Republic of Serbia, there are 22,150 hectares of vineyards in Serbia.

Within the vine-growing Serbia, there are three main regions which represent geographic entities, and which are further divided into vine areas, and then into vineyard fields. Their share in total vine area is represented in Figure 4.

Figure 4: *Distribution of planted vineyards surface among vine areas*

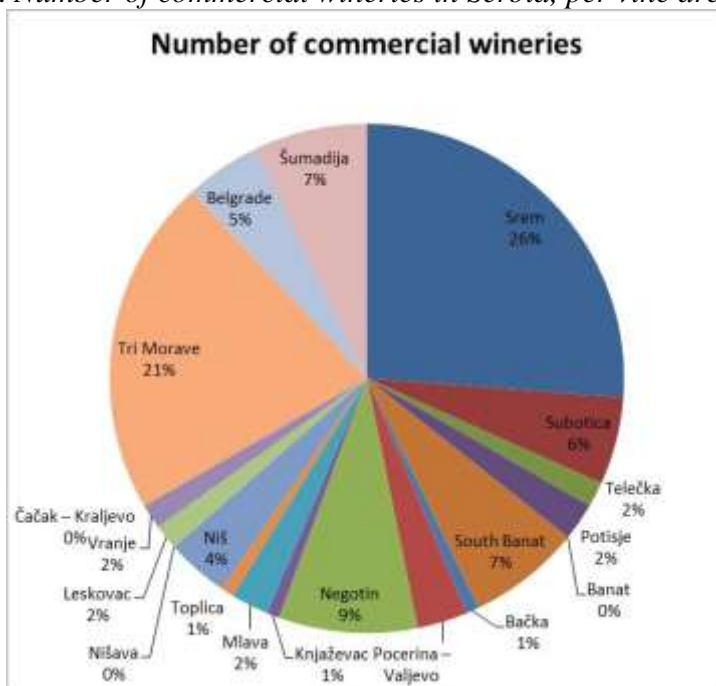


Source: *Wine Atlas, Authors' calculation*

Figure 4 shows distribution of planted vineyards surface among vine areas. The largest ones are Tri Morave (34% of all planted vineyards in Serbia) and Srem (10%), followed by South Banat (8%), Leskovac (7%), Knjaževac, Šumadija and Belgrade (5% each). Others participate with less than 5%. It is important to highlight that distribution of vineyards (hence the basis for wine tourism) matches with already developed tourism destinations.

Figure 5 represents the number of commercial wineries in Serbia per vine area. It is important to highlight the number of commercial wineries, as not all the wineries produce and sell wine to the third parties. However, as entities that already possess vineyards and/or grape processing facilities, it is quite possible that at certain moment they decide to switch to commercial wine production. Although second in the planted areas, Srem and Fruška gora dominate with the share of 26% of all commercial wineries in Serbia. Tri Morave follows with 21%. Others participate with less than 10%.

Figure 5: *Number of commercial wineries in Serbia, per vine area*



Source: *Wine Atlas, own calculation*

It is important to state that Serbia has defined a very important framework for wine tourism, which is a wine route. Wine routes are important part of every wine region; they should be creative, clearly marked and synchronised with other entities on the route, in order to provide full satisfaction of tourists throughout the whole route (Škrbić et al., 2015).

Project of wine routes has been realised in 2010 by the Ministry of Economics and Regional Development, with the support of Association of Wine Roads of Serbia, and the following wine routes have been defined:

1. SUBOTICA: Subotica, Palić, Hajdukovo
2. FRUŠKA GORA: Neštin, Sremski Karlovci, Irig, Indija
3. VRŠAC: Vršac, Veliko Središte, Gudurica
4. PODUNAVLJE: Dobri Do, Smederevo, Kličevac
5. ŠUMADIJA: Valjevo, Topola, Arandelovac, Krnjevo
6. JAGODINA: Jagodina, Oparić
7. ŽUPA: Aleksandrovac, Trstenik, Buče
8. NEGOTIN: Mihajlovac, Negotin, Rajac
9. NIŠ – KNJAŽEVAC: Malča, Svrljig, Knjaževac

According to this analysis, it is clear that Serbia possesses significant potential for the development of wine tourism.

Road map for the Winery Categorisation in Serbia

The system of winery categorisation in Serbia does not exist, nor is there any related project planned. There was an effort of Vineyard-Growers and Wine Producers` Association of Serbia and Wine Tourism Academy in 2011 to introduce some basic elements of categorisation of wineries, but the project was never adopted by the Ministry of Economics and Regional Development, which was in charge of tourism at the time.

Serbian wineries do not have required resources to organise and manage complex procedure of setting up and maintaining the system of categorisation. As we learned from experiences of other countries, it is important to group all stake holders around the common interest – improvement of regional/rural development by improving wine tourism.

The lead role in this process should be given to Tourism Organisation of Serbia. The process should comprise defining strategic attributes and goals, which will be translated into ranking criteria. The members of evaluation commission should be independent professionals. The first evaluation should comprise all wineries, and for the future re-evaluations sources of financing should be defined.

Effects of categorisation for Serbian wineries could be numerous:

- Tourism offer in wineries is standardised and transparent, therefore a tourist can expect the same level of quality.
- Tourists save their time and energy in searching points of interest, and are sure that they will find a service at a certain level.
- Giving information and promoting wineries and wine regions, and tourism in general, which imposes numerous socio-economic effects (stops emigration from rural to urban areas, boosts local economy, increases level of utilised soil in the region).

Thus, it becomes clear that the development of standardisation is important task that could provide a number of benefits for Serbian wine tourism.

Discussion and concluding remarks

The goal of this paper was to analyse situation in wine tourism in Serbia, provide insight into the existing legislature, define potentials for wine tourism in Serbia and give a direction for possible improvement of Serbian wine tourism through the standardisation of offers in wineries. First step towards development of effectiveness of wine tourism strategy is to understand motivation and entrepreneurship drive, as well as winery potential (Razović, 2015). As we saw in analysing official documents, out of which some do not even mention wine tourism, we can conclude that *H1: Wine tourism in Serbia is a tourism product with particular importance* is not proven, i.e. we can reject the hypothesis. The analysis of the relevant official laws, directions and documentations show that little attention has been directed to the development of wine tourism. However, in the analysis of the wine industry in Serbia we saw enormous potential of wine tourism. There is significant growth of wine industry each year, in terms of vineyards planted and number of commercial wineries (Figures 4 and 5) as well as defined the 9 different wine routes.

Looking at the cases of regions that introduced the system of winery categorisation (Hungary and Croatia), and its positive effects on wineries and their domicile regions, we can conclude that we have proven *H2: Standardisation of the offer in wineries can enforce wine tourism development*. In this paper the road map for introduction of standardisation is presented.

As stated earlier, categorisation of wineries is a new practice, yet to be adopted by famous wine regions. However, what cannot be achieved by reputation (no new region can achieve popularity of Napa Valley or Bordeaux), can be achieved by offering additional value for tourists. It is of significant importance for wine regions that are situated in rural and developing areas, which are yet to attract the influx of wine tourists. However, there is no available a more detailed analysis of the effects of categorisation to the wine region, its economy and its inhabitants and this can be direction for future researchers.

The contribution of this paper is mainly to raise attention and to point to a new area of wine tourism, both for theory and for practice. In this paper, the analysis of Serbian legislation is presented as well as the analysis of two introduced standardisation systems in two wine regions. In addition, the potential for Serbian wine tourism is analysed and recommendation

for possible standardisation was made. Some of the results could be important to different stakeholders of wine tourism market - wine makers can understand what criteria may be valued and can prepare their facilities and staff on time; tourism organisations and policy makers can see the way some regions already successfully boosted wine tourism; tourism agencies and tour operators may provide their support in implementing categorisation as it would be a benefit for their clients and it would be easier for them to promote wine routes; tourists or visitors may also provide support for implementation of this system as it would increase the value of their travel and they would be able know what to expect when visiting a winery; other researchers can explore to a greater extent the effects of categorisation.

This research was limited by the fact that the practice of categorisation of wineries is a new phenomenon in the wine tourism industry. Therefore there is very narrow scope of persons and entities involved in the process of categorisation, as well as research sources.

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