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TABLE OF CONTENTS

FOREWORD	7
Dejan Metodijeski; Oliver Filiposki ANALYSIS OF WINE TOURISM OFFER IN NORTH MACEDONIA	0
Nikola Dimitrov IDENTIFICATION DEFINITION, DETERMINATION AND PROMOTION OF LARGE MOUNTAIN TOURIST REGIONS IN THE WORLD	10
Dushko Josheski; Tatjana Boshkov SIMULATING THE DIAMOND-PISSARIDES-MORTENSEN MODEL: SEARCH MODEL THAT GIVES REALISTIC ACCOUNT OF UNEMPLOYMENT	21
Dushko Kocev OUTSOURCING STRATEGY: OUTSOURCING THE FINANCE AND ACCOUNTING FUNCTION BY SMEs	44
Marija Magdinceva Sopova & Aneta Stojanovska Stefanova THE IMPACT OF COVID PANDEMIC AND THE POLICY ACTION FOR RECOVERY OF THE SMALL AND MEDIUM ENTERPRISES	54
Cane Koteski; Blerta Zimeri WINTER TOURISM IN NORTH MACEDONIA AND ITS IMPACT IN THE ECONOMIC GROWTH	63
Flori Asani; Perparim Qahili SALT AND SEASONINGS AS A FOOD PRODUCTS.....	67
Baton Zimeri; Erda Shabani TREND OF GROSE POLISED PREMIUMS ACCORDING TO INSURANCE CLASSES. COMPARATION 2020 WITH 2019	73

ANALYSIS OF WINE TOURISM OFFER IN NORTH MACEDONIA

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Abstract

Wine tourism covers wide range of tourist activities as visiting wineries, vineyards, wine tasting, wine routes, wine museums, wine events etc. Wine tourism is a specific type of tourism which is constantly growing and represents a significant part of the tourist offer of many countries worldwide, most of them countries with a tradition of wine production. The rich tradition of vine growing and wine production in North Macedonia started back in ancient times, and today, there are over 70 wineries located in the three wine regions. The subject of this paper is the analysis of wine tourism offer in North Macedonia. The paper presents review of relevant literature concerning wine tourism and wine tourism offer in the country. For the purpose of the paper, a research methodology and secondary data sources have been used by consulting literature, studies, statistical data and official web pages of the wineries in North Macedonia. In the paper, 28 wineries are analysed and beside wine tasting criteria, other aspects of wine tourism are covered in the research as restaurant services, accommodation and conference facilities. Data presentation in tables and analysis has shown that, in addition to the Central wine region, containing 24 wineries, the capacity of the wineries for wine tourism development in the remaining two regions (Eastern and Western) is insufficiently used.

Key words: *wine regions, wine tasting, wineries, tourism services.*

JEL Classification: L83

INTRODUCTION

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 (Metodijeski & Micev, 2018). 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 (Carlsen & Charters, 2006). 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 (Getz & Brown, 2006). Wine tourism is also called enotourism by some authors (Ortiz et al., 2016). Other authors provide the synonyms oenotourisme or vinitourism for wine tourism (Jafari & Xiao, 2016). Enotourism, also known as wine tourism, refers to tourist trips specifically to wine-related destinations, allowing the visitors to understand viticulture methods, along with the processes behind wine production (Kwietniewska & Charzyński, 2020). 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 (Pivac et al., 2009). 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 (Geić, 2011):

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 (Bruwer & Alant, 2009). 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 (Geić, 2011):

- 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. (Charters & Knight, 2002). 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 1 below shows the typology of the wine tourism products (Manila, 2012).

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 Oneology	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 (Hall et al., 2000). 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 regions 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. (Hall & Sharples, 2008).

The research data from the United Nations World Tourism Organization (UNWTO, 2016) 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

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

As shown in the Table 2, most of the wine tourists are visiting 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.

MATERIAL AND METHODS

History of wine making in North Macedonia

Winemaking is a process of production of wine, starting with the selection of the grapes, its fermentation into alcohol, and the bottling of finished liquid. The rich tradition of vine growing and wine production in North Macedonia started back in ancient times, testified by the numerous artefacts found on the territory of the country. Golden amphorae and craters (vessels for wine transportation and consumption) were found at the necropolis site in Trebeniste near Ohrid. The bronze statue Menada, found in Tetovo, dates from the 6th century BCE. The menades were companions of the wine god Dionysus and during the celebrations in his honour, they would serve the guests. The tradition of antiquity continued in the Roman period, when Macedonia was one of the most important wine regions, and that tradition continued until the Slavs arrived, and continued until the fourteenth century. During the Ottoman Empire (1350-1918), wine production in Macedonia declined and was maintained in numerous Orthodox monasteries. Phylloxera (a small insect that attacks the root and leaf of the grapes) strongly affected Macedonia between 1890 and 1920, when many vineyards were excavated, and in some areas wine production and grape growing were fully terminated. The oldest agricultural schools in the country were established in Bitola in 1908, in Tetovo in 1928, but only after World War II did departments for studying wine production and viticulture emerge. The Institute of Agriculture in Skopje was established in 1927, and the departments of viticulture and wine production were established in 1944. Macedonian viticulture peaked in the 1980s, when Macedonia produced two-thirds of the total wine production in the former Yugoslavia, but with gaining independence in 1991, wine exports declined dramatically.

Today, viticulture is one of the main branches of the total agricultural production, that is to say, the most important strategic industry in North Macedonia, taking into account that together with wine production it contributes about 17%-20% of the agricultural GDP (gross domestic product). Wine ranks first in the export of beverages, and is the second most important product, after tobacco, in terms of export value of agricultural products. The vineyards today cover about 24,000 hectares (Metodijeski et al., 2019). However, despite favourable climate conditions, large fluctuations have been observed in the last 30 years on the grape growing areas. This situation is a consequence of the delay in the restoration of the vineyards, that is, the deteriorated age structure of the vineyards, where the share of the plants over 20 years old is very high. At the same time, the size of the plots is small, due to the long fragmentation of agricultural land, due to inherited traditions, lack of land market and long periods of underinvestment in this sector. In 2018, the total wine production in the country was 781,292 hectolitres of wine and this is a slight decrease in production compared to other years. The average annual wine production is about 800,000 hectolitres, most of it as bulk wine (about 80%) and the rest as bottled wine. In North Macedonia today, there are over 70 wine cellars located in the main wine-growing regions. Most of these wineries are mainly small and medium-sized, with capacity of up to 100,000 hectolitres, and only a small number have a capacity that is greater than 100,000 hectolitres. These wineries strive to concentrate on bottled wine production and high-quality wines through strict control of variety selection, vineyard management and harvesting, transportation and delivery practices. In addition, they invest in sophisticated finishing and refining equipment, bottling, and marketing technologies

and are competitive in both, domestic and foreign markets. Some of these wineries are focused on wine tourism development and have built a material and technical base for tourist acceptance and service, wine tasting, vineyard viewing, familiarising with the wine production process, wine sales, and additional services, such as conference facilities, sightseeing and organised tours and activities in the region etc. Wine tourism, as a specific form of tourism with a potential for development, is represented in strategy for tourism development of North Macedonia. In the country there are laws governing winemaking. The country also promotes wine tourism on national level through wine tourism guides and wine events, and associations of wine producers promote wine tourism with wine stores, wine museums, wine routes, wine fairs etc. Travel agencies provide and promote wine tasting tours with wine-expert guides.

Wine regions in North Macedonia

There are three wine regions in the North Macedonia (Vlam & Simjanoska, 2011; Beleski, 2014; Robinson, 2015): Central Wine Region (Povardarie), Western Wine Region (Pelagonija-Polog) and Eastern Wine Region (Pcinja-Osogovo). These regions are divided into 16 winelands.



Figure 1. Wine regions in North Macedonia

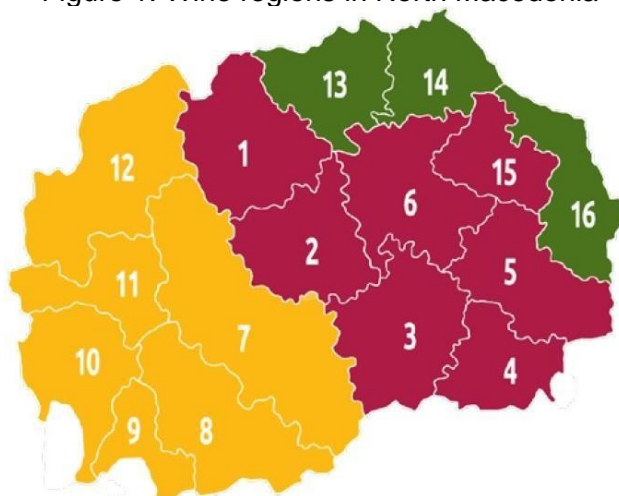


Figure 2. Winelands in North Macedonia: Skopje winelands (1), Veles winelands (2), Tikvesh winelands (3), Gevgelija-Valandovo winelands (4), Strumica-Radovish winelands (5), Ovche Pole winelands (6), Kochani-Vinica winelands (15), Prilep winelands (7), Bitola winelands

(8), Prespa winelands (9), Ohrid winelands (10), Kichevo winelands (11), Tetovo winelands (12), Kumanovo winelands (13), Kratovo winelands (14) and Pijanec winelands (16).

The Eastern wine region (Pcinja-Osogovo) accounts for approximately 4% of total production and includes 3 winelands: Kumanovo, Kratovo, Kochani and Pijanec. The vineyards are located at 440-850 metres above sea level and are planted on hilly and wavy fields, with moderately mild slopes with varying exposure. The climate is moderate continental with strong gusts of north winds. Over 110 days a year they have a temperature above 25 degrees. Precipitation averages 50 l/m², with dry periods rarely occurring during vegetation. Vineyards are grown on different types of soil, the most common being diluvial, cinnamon and brown soils on limestone. This region extends to the north-western part of North Macedonia and extends from Pcinja River to the west, to the Osogovo Mountains to the east.

The Central wine region (Povardarie) is the largest and most famous wine region in North Macedonia, producing approximately 83% of the North Macedonian wine. The vineyards are at 50-500/600 metres above sea level and extend along the Vardar Valley and between the high mountain ranges that rise to the east and west. The climate is Mediterranean to continental, with mild winters and hot summers. The temperature is above 25 degrees for more than 124 days during the year. Precipitation averages 46 l/m² and is evenly distributed throughout the year. Vineyards are grown on different types of soil, the most common being diluvial soil (plain fields).

In Western wine region (Pelagonija-Polog), the vineyards are located at 600-680 metres above sea level and are planted on the banks and in wavy fields, with moderately mild slopes with southern exposure. The high mountain climate dominates, which is characterised by humid and cold winters and dry and hot summers. Over 87 days a year the temperature is above 25 degrees C. Precipitation averages 57 l/m². Vineyards are grown on different types of soils, the most common being brown soil. This region produces about 13% of the total wine production.

Methodology

The subject of this paper is the analysis of wine tourism offer in North Macedonia. The paper presents review of relevant literature concerning wine tourism and wine tourism offer in the country. For the purpose of the paper, a research methodology and secondary data sources have been used by consulting literature, studies, statistical data and official web pages of the wineries in North Macedonia. An analysis and review of wine tourism in North Macedonia has been made, based on a systematic evaluation of the current content of wine tourism offer using methodology of content analysis (Ritchie et al., 2005). In North Macedonia today, there are over 70 wine cellars located in the main wine-growing regions. For the purpose of the paper, only wineries with wine tasting offer are included in the research. 28 wineries from three wine regions in North Macedonia are analysed in the paper and beside wine tasting criteria, other aspects of wine tourism are covered in the research as restaurant services, accommodation and conference facilities. The main source of secondary information and data used in this research is Study on wine tourism in Republic of North Macedonia (Metodijeski et al., 2019).

An important aspect of wine tourism is wine tasting, which is an integral part of the package of tourist services and is essential part of the tourist offer. Wine tasting differs from professional and expert wine tasting, since the purposes of the two wine tastings are different. The expert tastings are intended to give a professional evaluation of a specific wine, to classify them by quality of wine, to indicate the degree of quality and suitability with the category and name of a particular wine, wine tasting has a different purpose - it is a tourist service, where the main purpose is to present the wines to the tourists and to become acquainted with the

organoleptic properties in a certain atmosphere and with the necessary information related to the tasting set. The facilities of the wineries developed for tourist visit are mainly divided into two main parts: facilities in front of the winery (where tasting takes place and additional activities are conducted such as sightseeing and relaxation) and production facilities (where the production process with machinery and equipment takes place). Wine tasting as an essential element in the wine tourism offer has its own characteristics related to the following: wine tasting, organisation of tasting room, tasting performance and additional activities.

RESULTS AND DISCUSSION

Wineries offering wine tasting in North Macedonia by wine regions

In North Macedonia there are 28 wineries offering wine tasting for visitors and tourists (Metodijeski et al., 2019). These wineries, to the greatest extent, are located in the Central wine region (24), three are located in the Western wine region and one is in the Eastern wine region.

Table 3. Wineries offering wine tasting in North Macedonia by wine regions

Region	Winelands	Wineries
Eastern Wine Region	Kumanovo area	1
Central Wine Region	Skopje area	5
	Valandovo area	1
	Tikvesh area	14
	Veles area	2
	Ovche Pole area	2
Western Wine Region	Prilep area	1
	Ohrid area	1
	Bitola area	1
Total		28

As shown in Table 3, Tikvesh winelands, in terms of wineries in the country that offer wine tourism through wine tasting is well ahead of other winelands with 14 wineries available to tourists. Following the Tikvesh winelands, Skopje winelands is ranked second, with 5 wineries offering wine tasting as a basic form of wine tourism. Veles and Ovce Pole winelands have two wineries each, and Kumanovo, Valandovo, Prilep, Bitola and Ohrid winelands have one winery each that may accept tourists. The country's wineries, in addition to tasting, accommodation, restaurants and conference opportunities, offer vineyard walks, acquaintance with the production process and technologies of wine production and storage, various tours and organised excursions to visit sites or activities in the region.

In the Easter wine region, the following wineries are operational: Kokino, Trickovik, Premium, Vekovnik, Nipro, Zemsil Rik Sileks, and others. In the forthcoming period, these wineries are planning to create conditions for wine tourism development, by organising tasting, walks around the wineries, acquainting with the wine production process, etc., which would make them attractive for the tourists. At the moment, only Kokino winery, located in Kumanovo, is offering wine tasting. This winery also disposes of accommodation facilities, restaurant, and conference room.

Table 4. Wineries offering wine tasting in the Eastern wine region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Kokino	Kumanovo	Yes	Yes	Yes	Yes

It may be expected that more wineries from the Eastern wine region to equip their capacities and prepare those for acceptance of tourists, primarily for tasting, and later for accommodation, food, and supplementary services for the visitors. In addition to wineries, also important for the wine tourism development are the natural and cultural resources of the region.

The Central wine region is the most developed wine region in the country, and as such, it contains most of the wineries offering tasting to tourists. The Table below provides basic data on the 24 wineries offering tasting in the Central wine region.

Table 5. Wineries offering wine tasting in the Central wine region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Brzanov	Skopje	Yes	No	Yes	No
2	Kartal	Skopje	Yes	Yes	No	No
3	Kuvin	Skopje	Yes	Yes	No	Yes
4	Skovin	Skopje	Yes	Yes	No	No
5	Chateau Kamnik	Skopje	Yes	Yes	Yes	Yes
6	Valandovo	Valandovo	Yes	Yes	No	No
7	Bovin	Tikvesh	Yes	Yes	No	No
8	Venec	Tikvesh	Yes	Yes	No	Yes
9	Domen Barovo	Tikvesh	Yes	Yes	Yes	Yes
10	Domen Lepovo	Tikvesh	Yes	Yes	Yes	Yes
11	Kralica Marija	Tikvesh	Yes	Yes	Yes	Yes
12	Lazar	Tikvesh	Yes	Yes	Yes	Yes
13	Movino	Tikvesh	Yes	No	No	Yes
14	Pivka	Tikvesh	Yes	No	No	Yes
15	Popov	Tikvesh	Yes	Yes	No	No
16	Popova Kula	Tikvesh	Yes	Yes	Yes	Yes
17	Puklavec	Tikvesh	Yes	Yes	No	Yes
18	Stobi	Tikvesh	Yes	Yes	No	Yes
19	Tikvesh	Tikvesh	Yes	Yes	No	Yes
20	Trajkovski	Tikvesh	Yes	Yes	No	Yes
21	Tristo	Veles	Yes	Yes	No	Yes
22	Chateau Sopot	Veles	Yes	Yes	No	Yes
23	Imako	Ovce Pole	Yes	Yes	No	No
24	Ezimit	Ovce Pole	Yes	Yes	No	No

It may be seen from the Table 5, that most wineries (21) have restaurant facilities (with the exception of 3 wineries), accommodation is offered by only 7 wineries, and 16 wineries have conference facilities. In the future, it is expected that Central wine region wineries to increase their accommodation facilities in line with the growing demand for wine tourism, as

well as introduce additional services such as conference rooms where various events would be organised.

Table 6. Wineries offering wine tasting in the Western wine region

	Winery	Winelands	Tasting	Restaurant	Accommodation	Conferences
1	Mal Sveti Kliment	Ohrid	Yes	Yes	No	Yes
2	Chiflik	Bitola	Yes	Yes	Yes	Yes
3	Pirgan	Prilep	Yes	Yes	No	No

In the Western wine region there are several wineries, and only three wineries – Mal Sveti Kliment (Ohrid), Pirgan (Prilep) and Chiflik (Bitola) are offering wine tasting and are open to tourist visit (Table 6). A complete tourist service is offered by Chiflik winery, which, in addition to tasting, is offering accommodation, restaurant and conference facilities. Mal Sveti Kliment winery has no accommodation, and Pirgan winery does not dispose of accommodation and conference capacities.

CONCLUDING REMARKS

Wine tourism covers wide range of tourist activities as visiting wineries, vineyards, wine tasting, wine routes, wine museums, wine events etc. Wine tourism is a specific type of tourism which is constantly growing and represents a significant part of the tourist offer of many countries worldwide, most of them countries with a tradition of wine production. The rich tradition of vine growing and wine production in North Macedonia started back in ancient times, and today, there are over 70 wineries located in the three wine regions. 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. 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. 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.

The subject of this paper is the analysis of wine tourism offer in North Macedonia. For the purpose of the paper, a research methodology and secondary data sources have been used by consulting literature, studies, statistical data and official web pages of the wineries in North Macedonia. There are three wine regions in the North Macedonia Central Wine Region (Povardarie), Western Wine Region (Pelagonija-Polog) and Eastern Wine Region (Pcinja-Osogovo). These regions are divided into 16 winelands. 28 wineries are analysed in the paper and beside wine tasting criteria, other aspects of wine tourism are covered in the research as restaurant services, accommodation and conference facilities.

In the Easter wine region, the following wineries are operational: Kokino, Trickovik, Premium, Vekovnik, Nipro, Zemsil Rik Sileks, and others. In the forthcoming period, these wineries are planning to create conditions for wine tourism development, by organising tasting, walks around the wineries, acquainting with the wine production process, etc., which would make them attractive for the tourists. At the moment, only Kokino winery, located in Kumanovo, is offering wine tasting. This winery also disposes of accommodation facilities, restaurant, and conference room. It may be expected that more wineries from the Eastern wine region to equip their capacities and prepare those for acceptance of tourists, primarily for tasting, and later for accommodation, food, and supplementary services for the visitors. In

addition to wineries, also important for the wine tourism development are the natural and cultural resources of the region.

The Central wine region is the most developed wine region in the country, and as such, it contains most of the wineries offering tasting to tourists. Most wineries in Central wine region (21) have restaurant facilities (with the exception of 3 wineries), accommodation is offered by only 7 wineries, and 16 wineries have conference facilities. In the future, it is expected that Central wine region wineries to increase their accommodation facilities in line with the growing demand for wine tourism, as well as introduce additional services such as conference rooms where various events would be organised.

In the Western wine region there are several wineries, and only three wineries – Mal Sveti Kliment (Ohrid), Pirgan (Prilep) and Chiflik (Bitola) are offering wine tasting and are open to tourist visit. A complete tourist service is offered by Chiflik winery, which, in addition to tasting, is offering accommodation, restaurant and conference facilities. Mal Sveti Kliment winery has no accommodation, and Pirgan winery does not dispose of accommodation and conference capacities.

Data presentation in tables and analysis has shown that, in addition to the Central wine region, containing 24 wineries, the capacity of the wineries for wine tourism development in the remaining two regions (Eastern and Western) is insufficiently used.

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