



M.Sc. in Urban, Port and Transport Economics

Wine tourism and economic development of rural areas

The case of Central Macedonia/ the 'Wine Roads of Northern Greece'

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Abstract

The objective of this thesis is to investigate wine tourism development in a certain Greek wine region, the province of Central Macedonia and to explore the ways in which wine tourism can contribute to economic development of rural areas.

Triggered then by this central objective, the present study approaches the topic from the supply side view. Thus, the contribution of wine tourism in local economies is examined through the view of wineries and the other actors like tourism bodies, restaurateurs and municipal authorities implicated in it. Hence, a case study was conducted, that of Central Macedonia, to serve the study's main objective.

The primary data then, consistent with the literature to a large part, indicate that wine tourism in Central Macedonia has only recently developed and is still at an initial stage. However, it does affect the local economy in a positive way by improving the overall destination image, by spreading the tourist season, stimulating thus more tourism in the region and by enhancing the wine sector's income. Above all though, wine tourism sets the grounds for differentiation of the local economy which is an impetus for rural restructuring. Furthermore, both the case studies deriving from the literature and the one of Central Macedonia were very insightful indicating the quality of wine and service, effective marketing tools and an active support by the State as the major success factors. On the contrary, the main barriers identified comprise the inactive involvement of the State, the cost of travel and a lack of coordinated actions among the suppliers of wine tourism.

Key words: wine tourism, winery, tourist, rural development, Central Macedonia, success factors, barriers

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1. Introduction

1.1 Relevance

Wine tourism today is a flourishing industry and constitutes a challenge for the regions that encompass the requisite dependencies to implement it. Potential difficulties in applying wine tourism lie in the false estimation that it is just a visit to a winery. On the contrary, visiting a winery is only one of the components that formulate the practice of wine tourism. In fact, the term refers to a class of theme tourism, in which contact with the wine is the focus, not the end in itself (Hall et al., 2000).

Wine tourism is a growing niche market that has emerged to serve the varied needs and wants of tourists. In Australia for instance, a boom was recorded in the country's wine tourism with hotel occupancy climbing to 54% for the last quarter of 2012, while occupancy at the traditional mining regions has fallen according to the TTF-Hostplus National Accommodation Barometer. That growth potential for wine tourism has already caught the attention of the Australian competent authorities, namely Tourism Australia and Wine Australia, which have launched a three-year marketing partnership in order to promote Australia's wine regions to the world¹. The promising potential of wine tourism can be attributed to the fact that it is a synergy of two very successful sectors: those of wine and tourism. Under that perspective, wine tourism is a substantial marketing tool for wine-related economic activities to increase revenues and for wine regions to establish a brand name of origin and boost rural economy. The latter implies the contribution of the wine sector to that of tourism. Wine constitutes an important element of the attractiveness of a destination region since gastronomy is part of touristic activities and motives (Hall et al., 2002). After all, cuisine is a strong feature contributing to the creation of strong image perceptions to the non-locals. Thus, the benefits of wine tourism can develop regional economies.

The significance that local authorities along with wine makers attribute to wine tourism is evident by the amount of investments in local infrastructure in wine provinces and in marketing campaigns. One first example is the targeted investments of the Rioja appellation (Spain) on its most important exporting markets. The amount of total investments reaches up to € 7.4 million, of which € 3 million are aimed exclusively at the USA market which is the

¹ <http://www.news.com.au/travel/news/boom-in-australias-wine-tourism/story-e6frfq80-1226565357431> last visit on 10.03.2013

dominant exporting market of the Rioja appellation wine. The investment project started last year (2012) and intends to increase sales and reinforces the Rioja brand name. Moreover, last year was held the “1st Grand Tasting of Rioja Wines” in China to increase awareness of the appellation and motivate visitation to the region (Wines from Spain, 2013). Another impressive example that marks the increased awareness for wine tourism is the release of the Inside Burgundy ebook, put on the market by Apple and available for iPads. Jasper Morris’ “Inside Burgundy: a cote de Beaune” ebook has an impressive auxiliary material that consists of videos, photography, interactive maps as well as the opportunity for readers to add their own notes from tasting impressions of the various wines of the Burgundy appellation (the Guardian, 2013).

Concerning the academic community, the tourism literature classifies wine tourism as an industry in itself, noting though that it is inextricably linked with a number of other forms and sections of tourism (Getz, 1998), (Szivas, 1999), (Sharples, 2002). For example, Getz (1998) associates wine tourism with cultural tourism, rural tourism, festivals, events and more. Furthermore, there is a commonly adopted rationale among scholars that wine and dine may be one of the main motivations for visiting specific areas and countries around the world and activities based on wine and food can be an important part of the tourist experience. The very nature of the wine industry allows the creation of a relationship with the tourism industry, since wine is associated with relaxation, communication, nutrition and hospitality (Sharples, 2002); activities sought by tourists during their holiday. Hence, there is a consensus in the relevant literature that, as an alternative form of tourism, wine tourism still has some of the characteristics of general tourism like the capability to generate income and create job opportunities (Hall et al., 2002). The extent to which it can realize the latter though, still remains to be discovered.

Consequently, the field of wine tourism seems to attract the interest of scholars and public and private authorities and wine producers as well. In addition, due to the fact that international attention of tourism has shifted to the notion of sustainability, it is argued that the practice of wine tourism in rural areas implies its sustainable character while motivates a demand shift towards such areas seeking usually for development. The latter appears to be of particular importance for Greece, which constitutes a country severely affected by the recent financial economic crisis. Therefore, wine tourism could pave the way for economic revitalization.

Thus, the aim of this dissertation is to explore the significance of a certain part of the tourism broader offering in local development, that of wine tourism. To be more precise, the role of wine tourism as a potential for economic development is going to be examined. Moreover, the concept of wine routes is also going to be examined within the framework of wine tourism.

1.2 Main Question

Wine tourism is associated with a series of benefits for the local economy as identified in the study of Hall and Mitchell (2000). Among these are the creation and maintenance of local income and employment along with increased cellar door sales of wineries and higher margins since there are no merchant intermediaries. The latter is of great importance especially for smaller wineries. Hence, wine tourism is considered to be an engine for rural restructuring (Hall and Jenkins, 1998 in Hall and Mitchell, 2000). Thus, from the aforementioned derives the main basic research question of this study:

How can wine tourism contribute to the economic development of the rural areas?

Furthermore, a series of sub-questions needs to be addressed before answering to the main question. These are going to deepen into the study of wine tourism and will contribute to a more integrated approach of the problem statement. Therefore, the following constitute the sub-questions emanating from the subdivision of the main one:

- *What is wine tourism?*
 - *How is wine tourism different from general tourism?*
- *Who are the actors involved in wine tourism?*
 - *How are stakeholders organized?*
- *Why are local authorities involved in wine tourism?*

- *Why do firms invest in wine tourism?*
- *What can be the success factors or barriers for wine tourism?*

The first sub-question along with its sub-sub question refers to the concept of wine tourism in a broader sense. They aim to define it and differentiate it from tourism in general. The following three research questions concern the supply side of wine tourism. In order to address the economic impact of wine tourism on the society, it is first required to identify the actors involved in this alternative kind of tourism; recognize the stakeholders, how they are organized and why they are involved in this practice. The last sub-question aspires to identify which critical factors determine the success of wine tourism or impede its progress. The importance of such factors needs to be clarified in order to make the proper suggestions to all relevant parties involved for further development of wine tourism. Answers to the first sub-questions will be given mainly from the literature while the rest of them will be answered partly from literature and partly from the results of the primary research that will be conducted in a Greek province, that of Central Macedonia. The next section briefly discusses the methodology to be taken for the due study.

1.3 Methodology

The concept of wine tourism is relatively recent and there is still need for academic research upon it. Hence, the aim of this study is to shed light on the means wine tourism contributes to the revitalization of rural areas and identify the success determinants to do so. Thus, the basic research question refers to the ways in which wine tourism is able to induce regional economic development. This dissertation aspires to answer the problem statement through the case of a specific country, that of Greece. In particular, the focus will be on the province of Central Macedonia.

Consequently, the approach of the study will come in two phases. Some initial conclusions will be drawn through an extensive literature review. The later will constitute the first part of the research which will be followed by a comparative analysis of several case studies. The existing literature will also provide data to be acquainted with the way wine tourism is being

approached by other countries and what has been implemented relative to it. This section will consist of cases both from the Old World, like Italy and France, and the New World like Australia. The last part of the methodology includes the conduction of primary qualitative research that will be held in Greece, in which the marks of the recent financial crisis are apparent. Despite the economic recession of the country, tourism has long been an engine of generating income and job opportunities. Therefore, it will be very interesting to explore the dynamic of an alternative form of tourism, other than mass tourism, which is the dominant one in Greece. The research strategy is that of a case study while the primary data will be collected from personal in-depth interviews from actors representing the supply side of wine tourism. These will be both winemakers and cooperative actors like local authorities. In more detail, the focus of the qualitative research will be limited to a certain Greek region, that of Central Macedonia. The province of Macedonia is selected because the 'Wine Roads of Northern Greece' were initiated from that region. Thus, the interviewees will be members and non-members of this trademark, which is the most prestigious and well established project relative to wine tourism in Greece. The later therefore, allows for diversity in the sample drawing more thorough conclusions about wine tourism.

1.4 Structure

After having introduced the topic of this dissertation in this chapter the next sections will have the following sequence. The existing literature will be reviewed and analyzed in the second chapter of the thesis. The aim of this section is to frame the theoretical background of the topic and introduce the basic terms around which the study will revolve. Moreover, data for other case studies will be presented in the third chapter deriving from literature as well. The following chapter will discuss the methodological approach of the research. The setting of the survey will be analyzed and will include details about the advantages of the interviews as a research method, the choice of the sample, the content of the questions addressed to it and potential limitations of the survey. Chapter five will introduce the case study of Greece. Data from literature and the qualitative results will shape the framework of the Greek region of Central Macedonia. Further discussion of the results and comparison of the Greek wine tourism with that of the other countries will take place in the last chapter

(chapter 6). This final chapter will consist of discussion of the results, conclusions and some recommendations for the stakeholders and the academic community. Suggestions will be made in accordance with the results of the primary research at an earlier stage of the study.

2. Literature review

2.1 Introduction

Tourism today is not just an economic activity. Rather, it is perceived as a right, an opportunity to broaden our horizons, explore new cultures and approach the nature. Apart from that, tourism is also linked to several socioeconomic benefits. Through the years though, tourism has evolved into one of the most profitable and fastest growing economic activities throughout the world (UNWTO, 2013). Consequently, the tourism sector constitutes one of the most significant contributors for the national economies. Its continuous growth is linked to some extent to the diversification of the tourism product. The heterogeneity of the tourism demand reveals different types of tourists, with varied needs and wants and a vast number of motivations. Hence, the tourism sector is sensitive to lifestyle trends. Accordingly, this variation in needs and demands has led to differentiated tourism products and niche markets serving different kind of tourists (Gonzalez and Bello, 2002). Wine tourism is such a niche market which constitutes the main topic of the dissertation.

Therefore, it is necessary to introduce briefly all the definitions relevant to the tourism product in general, in order to comprehend better how it is practiced, what are the motives which induce the tourism experience and why niche markets like wine tourism do emerge. All the above are presented in the following section (2.2) while section 2.3 concerns a thorough overview of the theoretical background of wine tourism. The chapter then concludes in section 2.4.

2.2 Tourism in general

Although tourism is a fast growing industry at a global scale and a strategic factor for local development, it is hard to provide a unanimous definition. The notion of tourism though, is difficult to be formulated accurately and clearly described since its definition implies the tourism industry, so the broader the definition, the more sectors included in that industry.

That is why the academic research has tried to define tourism through different interpretive approaches like an economic one, a technical one, a holistic one and more. A summary of the various tourism definitions are presented in the Table 2.1. Apart from the definition approaches shown in the table, there are also technical ones which have tried to define tourism by demarcating three key elements present in the tourism practice, namely the purpose of the trip, the distance travelled and duration of the trip. Although there are several descriptions given for each one of these perspectives, there is no universal agreement upon a definition. However, it is important for a general description of tourism to be applicable in both international and domestic contexts in order to measure its size and impact. Therefore, the World Tourist Organization has proceeded to the adoption of a standardized definition of tourism: «tourism is the activities of persons travelling to, and staying in, places outside their usual environment for not more than one continuous year for leisure, business and other purposes» (WTO, 1999 in Gonzalez and Bello, 2002:53).

The definition given by the WTO (1999) implies what Leiper (1979) has argued for, that tourism is the interaction of two factors: on the one hand there are tourists seeking for new experiences and in need of support facilities and services and on the other hand there is a vast pool of resources providing these experiences, services and facilities. Therefore, these two forces constitute the demand and supply side of tourism respectively. The demand side is sensitive to lifestyle, personality and motivational framework. That is why differentiated forms of tourism have evolved, like business tourism, sports tourism or rural tourism; to satisfy these varied needs (Gonzalez and Bello, 2002). Under the supply side view of tourism, it is basically a retail industry. A final concept that has recently emerged and needs to be noted is that of the sustainable tourism. The notion of sustainable development first emerged in the late 1980s and ever since it has been of major concern for societies and scholars across the world. Subsequently, since tourism is an interaction among tourists, the tourism industry, the environment and the host communities (Bramwell and Lane, 1993, in Goeldner and Ritchie, 2009), the tourism sector could not remain unaffected by this new trend. On the contrary, it has to adapt to the new standards required for its sustainable development.

Table 2.1: Definitions of tourism

Author	Definition approach	Definition
McIntosh (1977: ix in Leiper, 1979:392)	Economic	«Tourism is the science, art and business of attracting and transporting visitors, accommodating them and graciously catering to their needs and wants»
Jafari (1977:8 in Leiper, 1979:394)	Holistic	«Tourism is the study of man away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he and the industry have on the host's socio-cultural, economic and physical environments»
Smith (1988)	Supply side	Tourism as an industry is the aggregate of all retail business that produce commodities for the traveler, regardless of his motivations or other personal characteristics.
UNWTO (2001 in Liu, 2003:460)	Sustainability	«Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future [...]in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems»

From the aforementioned, derives that tourism is a complex phenomenon and therefore difficult to form a succinct definition. The difficulty in describing this activity originates from the fact that a proper definition should capture every key component of the tourism system (Goeldner and Ritchie, 2009). Consequently, identifying the key elements constituting the tourism system is of great importance in order to establish a common point of reference when defining tourism. Therefore, the academic discourse tends to identify more or less the same tourism constituents but usually the definition approach for each one of them varies among scholars.

Leiper (1979) in his study identifies the following elements in the tourism system: the tourist, the geographical component, the industrial component and various interactions with broader environments. Goeldner and Ritchie (2009) recognize the same constituents with Leiper but tend also to include among them the natural resources and environment, the built environment and the spirit of hospitality as additional components of the due system. Furthermore, the spirit of hospitality has drawn the attention of the academic community since many authors recognize its importance like Gonzalez and Bello (2002) and Liu (2003). Therefore, hospitality is comprised among the features of tourism.

Despite the various constituents of tourism, the human element can be found across every attempt to define the tourism system and thus, it appears to be the most important one. Thus, it is also important to define who the tourist is. A visitor then is «any person travelling to a place other than his/her usual environment for fewer than 12 consecutive months and whose main purpose of travel is not to work for pay in the place visited» (WTO, 1999 in Gonzalez and Bello, 2002:53) Consequently, tourist is the overnight visitor, «a visitor staying at least one night in collective or private accommodation in the place visited» (WTO, 1999 in Gonzalez and Bello, 2002:53). Tourists comprise the heart of the tourism practice since their quest for travel experiences motivates their trips. At this point though, it is important to distinguish the tourist from the excursionist. An excursionist is the visitor «who does not spend the night in collective or private accommodation in the place visited» (WTO, 1999 in Gonzalez and Bello, 2002:53).

Moving on, the geographical component consists of three spatial elements which are the tourist generating regions, the tourist destination regions and transit routes. The first category refers to the permanent location of residence of tourists. These regions imply the points of departure and arrival of the tourist outflows. Therefore, tourist generating regions are considered to be the potential source for future tourism demand. It is there where the largest part of tourism marketing takes place (Leiper, 1979). On the other hand, the tourist destinations regions are the ones which attract and accommodate tourists. In fact, in the term is implied that all those features, natural or built attractions that induce tourist influx are part of the tourist destinations regions. Finally, the transit regions are the linking routes between the regions generating and accommodating tourists. Transit routes in addition are the places where the main transportation hubs of the tourism industry are located and therefore they affect the size and the direction of the tourist streams as well (Leiper, 1979).

With regards to the natural resources and the environment, these consist of the physical landscape of the destination, its climate and its people. Concerning the people, Goeldner and Ritchie (2009) speak of the residents of the destination and the current or even potential visitors to it, namely the tourism market. Concerning the natural resources, Liu (2003) distinguishes three categories of natural resources. These are nominally the touristic resources, the shared tourist resources and the common resources. The first category comprises of resources that are suitable only for the tourism experience, like sandy beaches or snowy slopes. Shared tourist resources are those that are used to a large extent for the tourism purpose but other industries like agriculture and fishery can have a share of. Such shared tourist resources are the sea and the forests. Lastly, resources like land and water that are used by any industry and in daily basis constitute the common resources. Leiper (1979) does not treat natural resources and the environment as a separate element of the tourism system; rather, he incorporates this feature into the geographical component. The same is true for the built environment as well. However, it should be briefly mentioned that according to Goeldner and Ritchie (2009), the built environment refers to the environment created by humans. Apart from the construct landscape that assigns the destination with a unique identity, the built environment also implies the culture of the people residing the region. This culture gives an essence of the past development of the host region and its modern lifestyle.

The industrial component is a big chapter in the tourism discourse. It is hard to demarcate the tourism industry since it is dependent upon the tourism definition. However, it can be said that the tourist industry comprises of all those businesses, organizations and facilities that are aimed to serve the needs of tourists (Leiper, 1979). The author distinguishes the industrial element into six sectors, namely the marketing, carriers, accommodation, attractions, miscellaneous services and regulations. The tourism marketing services like travel agencies are mainly located in tourist generating regions and aim to stimulate and facilitate communication between the subjects of the tourism system, such as tourists, destinations and other elements present in the tourism industry. Tourist carriers are located mainly in the transit routes and their main purpose is to provide public transportation to and from destination regions. Apparently, the tourist accommodation is found mostly in the destination regions but also at transit routes and consists of all the lodging and catering facilities like hotels, motels, camping grounds etc. Tourist attractions are sights, events and

other facilities destined to provide tourists with unique experiences. These can be either natural resources or construct attractions located in destinations and sometimes in transit paths as well. Miscellaneous services refer to all those additional services aimed to facilitate and enrich the touristic experience, like duty free shops, souvenir shops, travel insurances, restaurants and other services specialized in tourist markets. Finally, tourism regulations serve tourists indirectly and usually they involve governmental or vocational educational institutions which are aimed to assist operations within the tourism system.

The last component of the tourism system is the spirit of hospitality. The later is of great significance since all tourist operations would not be able to satisfy the needs and wants of tourists seeking for high-quality travel experiences, unless they were accompanied by a hospitality spirit. As Goeldner and Ritchie (2009) argue, visitors have the need to feel welcomed in the destination region and not just a steer source of revenue. A warm acceptance is what tourists seek for beyond any other travel experience and the host population is there to stimulate this feeling. Smith (1994) even talks about the hospitality resource. He argues that «the locals are subjects to be viewed and interacted with, or settings for tourist activities, and their attitudes and behavior constitute the hospitality resource of a destination» (Smith, 1994 in Liu, 2003: 466). Finally, Russo and van der Borg (2002) recognize that although hospitality is beyond the control of the planners, it is still of crucial importance for the attractiveness of a destination.

Consequently, all the components of the tourism system recognized by the tourism scholars mentioned above could be merged and summarized in the Figure 2.1. In conclusion, tourists are the driving force behind tourism. Their various motives and expectations induce the touristic activity. Furthermore, tourist destinations, along with all these features that promote the attractiveness of the destination regions, are responsible to provide tourists with all the necessary facilities to accommodate their inflows. However, natural resources, infrastructure and superstructure must be accompanied by a spirit of hospitality to excel the destination's appeal. All these elements together constitute the tourism system which is perceived to be a significant contributor to national economies.

Figure 2.1: The components of the Tourism System



2.3 Wine tourism

Tourism has long been associated with gastronomy, since one of the ways to experience a new culture is through tasting the local cuisine and drinks. Therefore, the definition of “culinary tourism” was soon evident (Long, 2004, in Kivela and Crotts, 2006). A culinary or a wine tour is often part of the holiday activities, once dining and wining is perceived by tourists as a pleasant way of exploring foreign traditions. Apparently, gastronomy has become an integral part of the touristic experience. Hence, gastronomical delights are usually sought by tourists in search for new products and experiences of high-quality standards (Kivela and Crotts, 2006). Wine tourism is one concrete example of a niche market developed to serve this type of sophisticated tourist demand. Thus, it reasonably derives from the term, that wine is the main component of wine tourism. However, as stated by Mitchell (2004, in Mitchell, 2006:13) «there is more to [...] wine tourism than the simple consumption of a beverage (albeit a hedonistic pursuit) [...] this experience is not limited to

the senses and emotions associated with the wine alone». Thus, what wine tourism actually is remains to be unfolded in the following sections.

2.3.1 Wine tourism definition

Occasionally, there have been formulated various definitions (see Table 2.2) of wine tourism which differ, depending on the angle of which the phenomenon is being approached (López-Guzmán et al., 2011). Besides, the tourism literature ranks wine tourism as an industry in itself, noting, however, that it is inextricably linked to a number of other forms and parts of tourism (Getz, 1998, Szivas, 1999, Sharples, 2002). Getz (1998) for instance, associates wine tourism with cultural tourism, rural tourism, festivals, events and more. Nevertheless, it seems that the majority of scholars adopt the definition given by Hall and Macionis (1998, in Sharples, 2002: 45): «visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors». The present paper also professes the above definition.

Moving on, according to Hall et al. (2000), a difference between the broader sense of tourism and wine tourism is that the latter's definition does not involve any statement concerning the length of stay, so under the term tourism, wine tourism implies both day-trip and overnight stays. This feature of wine tourism is also apparent at the definition given by Geißler (2007, in Pikkemaat et al., 2009: 239). In fact, it seems that wine tourism covers a large range of characteristics, namely a lifestyle experience, an educational feature, linkages to art, wine and food, an incorporated tourism-destination and a marketing opportunity as well for the region to develop its economic, social and cultural values (Charters and Ali-Knight, 2002). Moreover, as mentioned by Sharples (2002) is now widely accepted that wine and food may be one of the main motives for visiting specific areas and countries around the world and that the activities based on wine and food can be an important part of the tourist experience. The very nature of wine industry allows creating relationship with the tourism industry, since wine is associated with relaxation, communication, nutrition, hospitality and others, which tourists seek to satisfy during their holiday (Dodd, 1995).

As characteristically mentioned by Robinson (1994, in Sharples, 2002: 47), «wine related tourism has become increasingly important. For many centuries not even wine merchants travelled, but today many members of the general public deliberately make forays to explore a wine region or regions. This is partly a reflection of the increased interest in both wine and foreign travel generally, but also because most wine regions and many producers' premises are attractive places». Evidently, wine tourism is not an entirely new phenomenon as claimed by Sharples (2002). The author argues that the skills and knowledge related to the care of visitors in certain wine-growing areas have been around for many centuries. Trips to wine regions, as already mentioned, have been launched many centuries ago and thus, it is likely that some people will have stopped at wineries on their way, simply to quench their thirst for knowledge or taste the local wine, which might have even bought to take with them on their journey or for future consumption. It is very likely that scheduled visits to vineyards occurred in Ancient Greece and Rome, but it is much later that "organized" trips to these vines were introduced (Hall et al., 2000).

Consequently, wine tourism –its definition and the motives stimulating its practice- concerns the academic community for a few decades. Therefore, Getz (1998) has identified that wine tourism can be approached by three different perspectives. In the first one, it is being approached as a strategy which serves destinations to market wine-related attractions and place images. The second approach is from the perspective of the consumer behavior, where those interested in wine, visit their preferred destinations and finally, the last one sees wine tourism as an opportunity of wineries to educate consumer and increase direct sales at the cellar door. The second approach of Getz brings to the surface the need to characterize the wine tourist.

Table 2.2: Wine tourism definitions

Author	Definition
Western Australian Wine Tourism Strategy (2000)	«Travel for the purpose of experiencing wineries and wine regions and their links to the lifestyle. Wine tourism encompasses both service provision and destination marketing»
Getz (2000, in Sharples, 2002: 45)	«Travel related to the appeal of wineries and wine country, a form of niche marketing and destination development, and an opportunity for direct sales and marketing on the part of the wine industry»
Hall and Macionis (1998, in Sharples, 2002: 45)	«Visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors»
Geißler (2007, in Pikkemaat et al., 2009: 239)	«Wine tourism embraces and includes a wide range of experiences built around tourist visitation to wineries, wine regions or wine-related events and shows – including wine tasting, wine and food, the enjoyment of the regional environs, day trips or longer term recreation, and the experience of a range of cultural and lifestyle activities»
Getz and Brown (2006a: 79)	« The development and marketing of wineries as places to visit, and of destinations based on the appeal of wine»

2.3.2 Who is the wine tourist?

As one could expect, there is no unanimous definition of the wine tourist. However, there is segmentation of wine tourists in accordance with their motivation. Hall (1996) has identified three market segments of the wine tourism; these are namely the wine lovers, the wine interested and the curious tourists. A description of these segments, as claimed by the author, is illustrated below:

- *Wine lovers*: they are extremely interested in wine and winemaking and perhaps, the only purpose of their visit to a wine tourism destination is the wineries. Usually they are

employed in the wine sector and the food industry and they are mature, high-educated and high-remunerated people. Wine lovers are regular buyers of wine and food magazines while they have also visited several wine tourism destinations, buying winery products.

- *Wine interested*: they are very interested in wine, but it is not the sole purpose of their visit to destination. They are classified between the medium and high income groups and tend to have tertiary education. It is likely that they have visited other destinations of wine tourism and they are familiar with the process of wine production. Wine interested people are occasional readers of wine and food magazines and regular buyers of «lifestyle» magazines. Probably, it is the newspapers' columns about wine issues and discussions with friends that have stimulated their interest and trip to a wine region. They are also very likely to buy products from the winery.
- *The curious tourists*: these are people of a moderate income and education and display a moderate interest for wine. However, they are not familiar with the winemaking process. The purpose of their visit to the area was not wine-oriented and they may have visited other wine tourism destinations. Their curiosity for wine regions was caused either because they consumed or came across to winery products. Another possible reason for their visit there is that the trip to a wine region was part of a general promotion of tourism.

Another classification of wine tourists is that of Corigliano (1996, in Charters and Ali-Knight, 2002). This classification concerns the Italian wine tourists and is as follows: the Professionals, the Impassioned Neophyte, the Hanger-on and the Drinkers. According to Charters and Ali-Knight (2002), this segmentation is mostly based on age and demographic characteristics. Thus, most scholars (Charters and Ali-Knight, 2002) adopt or elaborate their research upon the segmentation of Hall (1996) mentioned above. However, Charters and Ali-Knight (2002) have conducted a research to examine further the wine tourist classification and go one step further from the segmentation of Hall (1996). The authors classify wine tourists into the following segments:

- *Wine lovers*: they have a strong foundation on wine knowledge and their main focus is on the wine alone. They are more likely to purchase wine from the cellar and the entire lifestyle package of wine is of particular importance for them. They are also strongly motivated in wine tourism to gain knowledge in food and wine.

- *Wine connoisseurs*: The 'wine connoisseur' is a sub-category of the wine lovers introduced by the authors and describes those with a deep knowledge of the wine field and a high interest for the sector. They have all the characteristics of wine lovers but they are distinguished by their thirst for further knowledge.
- *Wine interested*: They have some prior experience in tasting but not any further education upon the subject. They are interested in learning about storage and ageing procedure but are less likely to be interested in the linkages between food and wine.
- *Wine novices*: The 'wine novice' is the renamed category for the 'curious tourist' and includes those who may have attended some tasting prior to the visit in the winery but do not have any other education on the field. Their motivation is less concentrated than the other two segments and is mostly about wine tasting and undertaking a wine tour. They are more interested in wine tours due to their lack of knowledge while they find the idea of visiting a vineyard very attractive.
- *The Hanger-on*: the 'hanger-on' visits a winery with no obvious interest in wine, but as a part of group which has decided to visit the wine region.

A last attempt of wine tourists' classification to be mentioned is that of Alebaki and Iakovidou (2010a). The authors have held a survey at 133 visitors of wine tourism in Northern Greece. According to their findings, the average visitor is a man of young age, he makes frequent day trips to wineries with friends or family using his own car and buys wine from the wineries. Yet, except for the visits to wineries and visiting local restaurants, he likes wine and is interested in the production process since he considers he has an excellent knowledge around it. Other types of visitors deriving from the research are: low-paid students having as a basic visitation motive their interest in wine and winery. Another group is the occasional visitors who are not interested in wine but for local gastronomy. And finally, visitors who are not interested in wine, neither they are wine consumers, rather; they are even considering the vineyard and the winery as a tourist attraction.

Nevertheless, Charters and Ali-Knight (2002) support that there is no unique, formulaic visitor of wine tourism and wineries generally adopt an intuitive approach to segment their visitors. Rather, the literature review so far indicates relatively contrasting perceptions among the researchers in everything responding to the question of who is the wine tourist. This divergence in opinions is attributed by Getz and Brown (2006b) to the fact that the wine tourism product cannot yet be benchmarked as the examination of the factors jointly shaping the experience and the demand for wine tourism is still pending. Furthermore, it is

important to note that the profile of visitors to wine regions in a country or area should not automatically be regarded to be the same of another, or even between estates (Bruwer, 2003). Charters and Ali-Knight (2000) have come at the same conclusion, after their investigation between two regions of Western Australia. Moreover, the existing literature so far has suggested that a demographic approach of wine tourists illustrates to a large extent the wine tourism behavior (Alebaki and Ikovidou, 2011). Hence, it can be said at last, as Dodd (1995, in Alebaki and Ikovidou, 2011: 126) estimates, that wine tourists are generally people of higher income and education when compared to the average tourist.

The various segmentations of wine tourists are summarized in Table 2.3. However, to serve the purposes of this study, any tourist or day traveler who visits wineries and/or participates in other wine related activities during his stay at a wine region regardless of the primary purpose of his visit, is regarded as a wine tourist.

Table 2.3: Segmentation of wine tourists

Author	Segmentation of wine tourists
Hall (1996)	<ul style="list-style-type: none"> • The wine lovers • The wine interested • The curious tourist
Corigliano (1996)	<ul style="list-style-type: none"> • The professionals • The impassioned neophyte • The hanger-on • The drinker
Charters & Ali-knight (2002)	<ul style="list-style-type: none"> • The wine lovers <ul style="list-style-type: none"> ○ The wine connoisseurs • The wine interested • The wine novice • The hanger-on

2.3.3 Supply side of wine tourism

Evidently, the majority of the definitions given to describe wine tourism are formed under the demand perspective. However, wine tourism is not only a consumer-oriented practice; rather it is also «a destination planning and marketing strategy and it is a marketing and sales strategy for wineries and wine companies» (Getz et al., 1999: 20). In order for a definition to be complete, it is necessary that all these perspectives are taken into account. Therefore, it must be prior defined what constitutes the supply side of wine tourism.

To begin with, all the resources utilized by tourists for the purpose of wine tourism and the businesses and institutions which transform those resources into a wine tourism product, shape the supply side of wine tourism. In particular, such resources can be wineries, winery amenities, vineyards, festivals and shows, provided by the wine sector. Resources provided by the tourism industry include wine tours, accommodations and associated sectors such as restaurants and hotels (Hall et al., 2000). Wine producers, oenological workers and tourist operators are also included in the supply industry forming the human resources. Finally, the surrounding environment- infrastructure, scenery, local cuisine and social and cultural components of the wine region- are also part of the supply side. Moreover, institutional bodies are also included in the supply of the due industry since regulations, legislations and planning frameworks affect wine tourism. In fact, the role that government plays on wine tourism across different part of the world is a determinant when it comes to creation of appellation controls, the institution of health and safety regulations as well as planning regulations concerning the construction of facilities at certain locations. Furthermore, governmental aid is sometimes provided for infrastructure and networks support (Hall et al., 2000).

Apparently, since wine tourism is a branch of the tourism broader offering, it is reasonable to present some of the basic features of general tourism. In fact, almost every component of the tourism system is also found in wine tourism as well, but under a more specialized form as illustrated in Table 2.4.

Table 2.4: Corresponding components of tourism and wine tourism

Tourism	Wine tourism	
The tourist	✓ ²	The wine tourist
Geographical component	✓	<ul style="list-style-type: none"> ○ Wine tourism generating regions ○ Wine tourism destination regions³ ○ Transit routes
Natural resources & environment	✓ ⁴	Grapevines, vineyards, wineries, wine producers, oenological workers and tourist operators
The built environment		
The industrial component	✓	Destination planning, wine marketing, accommodation, wine amenities, wine festivals and shows, miscellaneous services, regulations and legislations
hospitality	✓	hospitality

In fact, wine tourism can be of major importance for small and medium wineries facing an increased global competition in wine production along with tighter margins (Carlsen, 2004). Thus, wine tourism can be the core business for such wineries whereas it constitutes a secondary business activity for other wineries (Hall et al., 2000). At this point then it is necessary to define a wine tourism firm; as a wine tourism firm then, is considered a firm which owns a vineyard and produces wine while it provides authentic experiences for its visitors, through a wide range of services and products that the firm organizes and manages. It can even provide hospitality and catering, tours and information, cooking classes and wine production. It is also possible to organize special events and offers recreational infrastructure such as playgrounds, picnic area, conference rooms and retail selling points for various products and craftwork (Presenza et al., 2010). Evidently then, a wine business

² The symbol indicates that the component of the tourism system on the left column is also present in the wine tourism system.

³ Getz and Brown (2006a: 79) define wine tourism destinations as «regions which base some or all of their appeal on wineries and wine-related benefits».

⁴ Natural resources & the environment and the built environment are referred as one in the wine tourism system. Moreover, human resources constitute a single component in the wine tourism system. In this summarizing table (2.4), human resources are merged with the natural resources & the environment and the built environment component.

enters the wine tourism market because of its perceived benefits. These are going to be examined in the following section.

2.3.4 Advantages and disadvantages of Wine Tourism

The development of wine tourism can impact throughout the local economy. The greatest stimulus for its growth can be derived from an understanding of the range of the significant benefits that can be offered across the region where wine tourism is developing (Correia, 2006). Wine tourism acts positively throughout the socio-economic structure of the rural area where it is practiced, adding value to the region, generating employment opportunities while increasing human capital and consequently, increasing the regional income (Gatti et al., 2003).

According to Macionis and Cambourne (1998) and Szivas (1999), the benefits of wine tourism are the following:

- It can contribute to the development of tourism in a destination
- It can attract visitors who are interested in wine and thus, create new demand for a country or a region
- The development of tourism around the theme of wine can improve the image of the destination where food and wine are part of this image
- It may scatter tourist flows geographically away from entrenched tourist centers, relieving them from the stress and also providing the motives for development in more remote areas
- It contributes to raising the profile and image of wine
- It contributes to strengthening the perception of consumers on wine
- It increases the commercial potential of wineries through direct sales at the cellar door and other distribution channels
- It adds value to landscapes, gastronomy and local culture of the rural areas
- It offers opportunities for development in traditional depressed rural areas that are in need of an economic stimulus.

It is generally accepted that wine tourism is important for tourism destinations, although it is debatable which one of the two industries, those of wine or tourism, is the primary beneficiary. This inevitably varies from destination to destination and depends on factors such as the history of the development and the nature of the wine and tourism industry (Szivas, 1999).

Moreover, Dodd and Bigotte (1995) and Day (1996, in Hall et al., 2000) have identified certain advantages and disadvantages of wine tourism for wineries in particular. As far as the advantages are concerned, these can be presented as follows:

- More potential customers and more opportunities for the wine producers to test their products
- Greater awareness and loyalty towards their products from their customers through direct contact between the producer and the consumer
- More direct sales at the cellar door, where the cost of the intermediary is not transferred to the customer
- An additional point of sale, or for smaller wine producers who cannot guarantee a sufficient volume or supply stability, the only feasible point of sale
- Business intelligence with regard to wine products. Wine producers can directly acquire valuable information for their products from consumers' reactions
- Visits to wineries help create awareness and appreciation for the wine and the wine industry itself while knowledge and interest generated by these visits have resulted in increased wine consumption.

On the other hand wine tourism is not always beneficial for wineries and wine producers are even hesitant or skeptical towards wine tourists. Wine producers are sometimes cautious towards tourists that are motivated by the opportunity to drink for free whereas they are not interested in educational benefits. These tourists are often called "mobile drunks" by the winery owners. Furthermore, there are some conflicts concerning the issue of land-use for wine tourism attractions at the expense of vine land (Carlsen and Ali-Knight, 2004, in Carlsen, 2004). However, apart from the aforementioned, other disadvantages for the wineries as identified by Dodd and Bigotte (1995) and Day (1996, in Hall et al., 2000) are the following:

- Increased costs and time-consuming management associated with the functions of a visited winery. Running a tasting room can be costly, especially if it requires the employment of paid staff. Moreover, while profitability is high on directly to the consumer sales, profit may be reduced if the wineries do not charge for the tasting
- The substantial capital investments required to build facilities in order to accommodate visitors
- The inability of a substantial increase in sales. The number of visitors that a winery can attract is limited and in the case that a winery cannot sell all its stocks, it will probably need to use other distribution points.

Despite the fact that the wine and the tourism industry are «actually diametrically opposed economic activities» (Carlsen, 2004: 6), these two economic sectors have managed to create a synergy of actions to benefit both industries. Notwithstanding challenges and difficulties of wine tourism, most of the relevant literature (Charters and Ali-Knight, 2002, Carlsen, 2004 and Hall et al., 2000) emphasize its advantages with growth of the depressed rural areas and increased revenues for the wineries being the most frequently mentioned ones.

2.3.5 Wine Routes definition

The first wine route identified in Germany dates back 60 years while the first wine route in France dates back 40 years. In the Mediterranean countries this concept has been only developed through the recent years and is seen as a means of valorization of the Protected Designation of Origin (PDO), enhancement of regional employment and increase of local income (Vlachvei and Notta, 2009). However, a uniform definition of this concept is needed in order to define the framework within wine regions could establish such a trademark.

The term “wine route” is used to describe a tourist route that connects several wine estates and wineries in a given area. This route is further characterized by natural attractions, like mountains or scenery, physical attractions like wineries, vineyards, and roads and markers like signposts directing the tourist to the individual wine route estate enterprises. The majority of wine routes imply a delimited space of a usually demarcated wine region that

has an identity on the form of a distinctive brand name like Champagne in France or Stellenbosch in South Africa. The mixture of environmental, cultural and social features attributes a distinctive identity to each wine route so the tourist is able to recognize the difference when moving from one route to another (Hall et al., 2000, in Vlachvei and Notta, 2009). In a more strictly defined term, «...usually a wine route consists of a designated itinerary (or several) through the wine region which is thematically signposted as well as being interpreted via a free leaflet and map, which notes the different vineyards and winemakers and provides information on sites of historical and other interest» (Hall et al., 2000, in Bruwer, 2003: 424). Another similar definition referring to the due concept is given by the Centre National des Ressources du Tourisme en Espace Rural (Gatti and Incerti, 1997: 219) and is as follows: «the “wine route” is a signposted itinerary, through a limited area (region, province, denomination area) whose aim is the discovery of the wine(s) product(s) in the region and the activities which are associated with it. This discovering is carried out directly in the farms (enabling the traveler to meet the producer) and/or in the spaces specifically organized around the wine produced (wine tasting centers or wine museums) ».

In other words, tourists following a Wine Road have the opportunity to enjoy a wide range of experiences, including visiting vineyards, the opportunity to taste and buy wine, visiting a vineyard or a local museum that gives information about the winemaking tradition and the history of the area. Often, there is the option to stay in agro tourist lodgings. They can even try the culinary specialties of the region and buy products that characterize the area whilst enjoying the scenery (Brunori and Rossi, 2000). A Wine Route almost always is accompanied by a brochure with a map showing the route and its various stages. This is a factor of particular importance since it is often what initially motivates tourists to follow a wine road (Gatti and Incerti, 1997). The Wine Roads can either be organized by public bodies involved in tourism, either by commercial groups, such associations, professional compounds, or other compounds (Gatti and Incerti, 1997). Creating a Wine Road requires, first of all, the collective efforts of various actors, which are used to collaborate frequently with each other and the reach of a consensus among their various needs (Gatti et al., 2003).

The Wine Routes trademark is one of the most interesting instruments applicable to the exploitation of typical wines and the regions where they are produced, that spread across the latest years in the countries of southern Europe and is already established in wine regions of Northern Europe (Gatti and Incerti, 1997). The largest part of the structure of the wine tourism and its spread is based on the ‘Roads of Wine’ concept (Correia, 2006).

According to Bruwer (2003) the development of Wine Roads forms an inextricable part of the wine tourism industry. In essence, as he claims, the Wine Routes «are the 'roadways' to the core attraction in wine tourism—the wines and the winery production facility» (Bruwer, 2003: 424). The Wine Road as a product should be developed around a base of local produce and historical, cultural and natural attractions combined with a high level of service (Arfini et al. 2002). Apparently, a number of Wine Routes have been established across the wine regions implying that there is a plethora of benefits related to such initiatives.

2.3.6 Advantages and disadvantages of Wine Routes

The social and economic benefits of a Wine Route to local wineries are impressive. When a road wine has been successfully set up, it affects positively on the wine farm employment. First, it increases the efficiency of existing activities, and secondly, it creates new employment opportunities in the winery. All the wineries participating in the Wine Route reap benefits which do not require any special effort on behalf of producers. Apparently, they benefit from the general development of competitiveness in the area that comes along with the establishment of the Wine Road. Moreover, a Wine Route contributes in improving the landscape since producers realize how important the appearance of the wine farm may be, through direct contact with tourists (Brunori and Rossi, 2000).

The Wine Roads, according to Brunori and Rossi (2000), affect the number of tourists visiting the area and constitute them aware of the particular features of the area. Hence, the more tourists visiting the area, the bigger the demand gets for local product and services like olive oil, honey, wine and agro-tourist services (Brunori and Rossi, 2000). In this way, the region's reputation for production becomes established and it becomes possible to differentiate it from others area. This reputation is turned into a premium price, or helps stimulate the growth of specific markets such as those for bottled wine and wine labeled on the farm. Consumers regard wine bottled on the farm as a sort of 'quality insurance', since it gives the wine a genuine link with the territory of production (Brunori and Rossi, 2000). As reported by Gatti and Incerti (1997), a Wine Route is by nature particularly suitable for rural development. It includes sectors facing difficulties and requiring modernization as is the wine sector and agriculture, and it effectively connects them with touristic areas featured by

remarkable growth, like those of rural tourism and theme tourism. Telfer (2001) points out that as the links between tourism and agriculture continue to grow, they create greater opportunities for stimulating rural development. Emerging markets and managers must be ready to take cooperative measures in a competitive environment to take full advantage of the Wine Routes.

According to the survey of Karafolas (2007) held in 26 wineries in Northern Greece, it is illustrated that the impact of Wine Routes can be considered positive, since the area has the following advantages:

- An increase of cultural events
- An increase in the number of visitors
- An increase in employment rates
- The promotion of the region

However, the author concludes that not all regions are benefited to the same extent. As he states, the benefits emanating from the Wine Routes development are more pronounced in those regions where members were actively involved (Karafolas, 2007). In fact, this section could not conclude better than citing a phrase of Gatti and Incerti (1997: 222) which seems to summarize the whole concept of the establishment of Wine Routes: "It is not possible to improvise a wine route». Their success in Europe was founded upon a combination of a business intelligence to exploit the natural resources to attract tourism on the one hand and the excellence in wine producing tradition and the entrepreneurial spirit of some winemakers on the other.

2.4 Conclusion

In this chapter an overview of the literature has been presented concerning tourism in general and wine tourism in particular. Wine tourism constitutes a niche market of the tourism general offering, which has emerged through its association with one manifestation of the tourism experience, that of gastronomy. Thus, the variation in needs and demands of tourists has contributed to the development of this niche market. However, no unanimous definition or portrait of the wine tourist has been conducted. In fact, several tourism researchers and marketers have proceeded to a segmentation of wine tourists according to their motives. Yet, the supply of wine tourism, and mainly wineries and vineyards do not treat wine tourists differently according to their classification. There is a general perception among them that any tourist or day traveler who visits wineries and/or participates in other wine related activities during his stay at a wine region regardless of the primary purpose of his visit, is regarded as a wine tourist.

Hence, despite there is not much significance given to segmentation of the wine tourism demand, several actors are being involved in this practice; these can be either private ones like wineries, vineyards, restaurants, hotels or public ones, like municipal authorities, institutional bodies and often the government. Their involvement implies a series of advantages induced by wine tourism in order to justify their investments in this field. Consequently, actors from the wine industry invest in wine tourism mainly to increase awareness of their product and increase sales as well. Actors coming from the tourism industry are motivated by increased profits and/or company growth while local authorities are focused on the general improvement of the wine region's image through increased tourism flow which contributes to the overall development of the region. Nevertheless, the case studies of France, Italy and Australia in the next chapter and the case study of Central Macedonia will shed more light to the organization and motivation of the various stakeholders.

Finally, the general conclusion from this chapter is that wine tourism demonstrates many features of general tourism. However, as a niche market, every component of the wine tourism system is revolved around wine while there are no strict criteria to define who the wine tourist is.

3. Case studies of wine tourism

3.1 Introduction

Despite the fact that the advantages of wine tourism are more or less common, it has been approached and developed in different ways throughout the world. Although no benchmarking elements exist to compare it across regions, there is a wide difference between the European and the New World wine tourism model which is commonly accepted among scholars (Wiskerke and van der Ploeg, 2004). Hence, the various approaches and development strategies of wine tourism can enrich the study of wine tourism and functions as lessons for other emerging markets like Central Macedonia. Therefore, three case studies are presented in the section 3.4 focusing on France, Italy and Australia. Prior to the case studies though, a brief overview of the wine market worldwide is demonstrated (section 3.2) followed by an international overview of wine tourism (section 3.3).

3.2 Current developments in the wine sector worldwide

According to the estimates of the OIV (OIV, 2011), the world wine production in 2011 ranged between 264.3 and 257.2 million hectoliters (Mhl). Moreover, France constitutes the world leader wine producing country with 49.6 Mhl followed by Italy (42.2 Mhl) and Spain (35.4 Mhl). These three countries are also the leaders in the surface area of the world vineyards. Spain in particular, ranks first in the world list with a surface area of 14.3% relative to the world's total surface area. France ranks second with 10.9% and Italy follows with 10.6% (OIV, 2011).

Since 2004 though, the world wine production undergoes significant decrease.

Notwithstanding that the European Union as a whole, continues to dominate the sector with a share of around 65.5%, the wine production level of the EU 27 in 2010 is among the lowest in the past fifteen years. The situation is similar also for the year 2011, with the lowest production levels recorded in the countries of Greece, Italy and Portugal (OIV, 2011).

This development was to a large extent also the outcome of the recent restructure pursued in Europe within the context of the Common Organization of the Market in wine (CMO), which imposed a grubbing-up scheme for the vineyards and the orientation of agriculture production towards goods with minimal risk (CMO for agricultural markets, 2008).

At an international level, the downward in production is relatively modest since the decline of the surface area in the European Union is followed by a simultaneous increase in the surface area of vineyards in most of the New World countries. Apparently then, the penetration of countries like the USA, Australia, New Zealand, Argentina, Chile and South Africa in the global wine map, poses a substantial threat on the European dominance (Rossi et al., 2012). Furthermore, a decrease in the world wine consumption has been recorded during the years 2009-2011 (OIV, 2011). This downturn was also the result of the global financial crisis which significantly affected the southern European countries by the end of 2009 (Sumner, 2010).

Hence, at the same time Europe struggles to retain its attractiveness based on its developed schemes of Appellation d'Origine Controlée (AOC) and on "terroir", the New World proves more effective in attracting new consumers of younger age through the development of a marketing campaign which is based on the promotion of different varieties and brands (FAO, 2009). The effectiveness of this marketing campaign can be partially explained by the fact that wine is becoming increasingly popular in developed countries without any particular wine tradition and more specifically to the upper income groups (Hoffman, 2010).

Apparently, the aforementioned current developments constitute the wine sector a declining market the last few years. There is a decline in world wine consumption and decrease in world wine production. The later is mostly the case in Europe; however production still excesses consumption. Thus, wine tourism appears to be a great prospective in order to upgrade sales, at least for the Old World countries. Turning to wine tourism can be also explained by the fact that there is a change in lifestyle and trends in the emerging markets which have undergone an increase in the surface area of vineyards. Hence it can be said that Old and New World countries are oriented towards wine tourism for different reasons. Furthermore, world leading countries in wine production like France and Italy are facing difficulties in growing their market share. The threat posed on them by emerging markets like Australia, which pay great attention to the dynamic of marketing campaigns, justify the author's choice to study these three countries in the following sections.

3.3 International overview of wine tourism

Visitations to vineyards are part of package holidays at least since the Grand Tour (Charters and Menival, 2011) and they even date back to the Roman and ancient Greek times (Hall et al., 2000: 2). Nevertheless, only by the middle of the 19th century will wine itself constitute a single incentive for trip planning. Multiple factors have contributed to this development, like the «revolution in transportation» which has made even more destinations accessible, the «social revolution» which has generated a new middle class that seeks along with the aristocracy qualitative wine products and the quality improvement of the wines induced by the establishment of a wine classification system, the Classification of Wines of Gironde in 1855, which has given an appellation identity to wines (Hall et al., 2000: 2). However, despite the long relationship between wine and tourism, it is only recently that a coordinated cooperation between the two industries has emerged. The first official organizing effort of wine tourism was recorded by the beginning of the 20th century, mainly due to the design of the Wine Routes (Cambourne et al., 2000). After the year 1992, more respective initiatives start to be implemented in the European wine regions, mostly through the LEADER⁵ program and the support of the Europäische Weinstrassen⁶ as well (Hall et al., 2000). Few years later, since the middle of the '90s, wine tourism starts to develop as well in several wine regions of the New World countries like Australia, New Zealand, Canada, Chile, and South Africa.

Despite the relatively recent involvement of the New World countries in wine tourism, some of them have already established a strong tradition in that sector (Lopez-Guzman et al., 2009). Australia for example, holds a leading position in the development of wine tourism (Getz and Brown, 2006b). The Napa Valley region in the United States claims the leader position as a global wine tourism destination since its visitors surpass in number the 5 million people annually (O'Neil and Palmer, 2004). Moreover, about 400 wineries are located in the Valley (Tripadvisor, 2008). As far as Canada is concerned, the focus of the wine tourism development lies in the Niagara Peninsula in Ontario and in British Columbia (Wade et al., 2010). Most of the wineries are connected to a wine route established by the Wine Council of Ontario in 1988 (Carmichael, 2005), while all the wineries in British Columbia have

⁵ LEADER program='Liaison Entre Actions de Développement de l'Économie Rurale' (Karafolas, 2007).

⁶ Europäische Weinstrassen=European Council of Wine Roads (Hall et al., 2000).

a legal obligation to offer the opportunity for wine tasting and the direct sales of their products at the cellar door (Getz and Brown, 2006b).

Moving on to Chile, six wine producing regions have developed wine routes; these are namely the Aconcagua, Casablanca, Cachapoal, Colchagua, Maule and Curico. The largest amount of visitors is concentrated in the Maipo Valley (Kunk, 2008). Nonetheless, despite the successful wine exports of the country, the wine routes seem not to share the same fate (Kunk, 2009 in Hojman and Hunter-Jones, 2012). The large distance among the wine regions, the large distance from the capital (for most of the wine routes) and the lack of motivation and financial resources of the wine makers to enter the wine tourism field, do not tend to favor the development of the phenomenon in Chile compared to other New World countries (Hojman and Hunter-Jones, 2012).

South Africa at last, constitutes one of the oldest wine industries among the countries of the New World, since the beginning of wine production dates back to the 17th century (Bruwer, 2003). The first wine route was created in Stellenbosch the year 1971 which paved the way for the creation of other wine routes too (Preston-Whyte, 2000). Nowadays, the center of the wine tourism development locates around the Cape Town City, which comprises the following wine regions: Stellenbosch, Franschhoek, Paarl and Loubser (Bruwer, 2003).

Wine tourism for the New World regions is seen as a means of generating substantial income and tourist flow long-term (O'Neil and Palmer, 2004). However for the countries of the Old World, wine tourism is not «a novelty» (Gatti et al., 2003: 229); rather, it is strongly associated with their tradition in wine making, which is long embedded in their culture (Gatti et al., 2003). Nonetheless, it seems that this kind of tourism is not equally developed in Europe. The southern countries are less developed in that field compared to others, like Germany (Charters, 2009).

To begin with, wine tourism in Germany dates back at 1920 with the creation of the first wine route in Schweigen (Cambourne et al., 2000). Ever since, wine tourism constitutes an inextricable part of the tourism growth in the country and moreover, it is one of the economic sectors with the biggest growth rates (Cambourne et al., 2000). Furthermore, 60% of the German wineries are open to visitors (Official Chamber of Commerce and Industry of Valladolid, 2005 in Marzo-Navvaro and Pedraja-Inglesias, 2010). Austria demonstrates similar characteristics with Germany in that field; however, the majority of the accessible

wineries are located close to Wien. There are three wine regions in the country, these of Styria, Lower Austria and Burgenland but the Wine Route of Southern Styria is the most organized one (Meyer-Czech, 2003: 150). With regards to Spain, the first wine route is organized in the Rioja region during the '70s (Lopez-Guzman et al., 2009) and since, wine tourism in Spain is flourishing. Years later, in 2009, the Spanish wine routes are also framed by a state program for the development of gastronomy tourism (Marzo-Navvaro and Pedraja-Inglesias, 2009). There are also some emerging markets in Europe, such as Hungary, Romania and Bulgaria (O'Neil and Palmer, 2004).

To conclude with, it is apparent from the brief overview of the wine tourism growth worldwide that it is not homogeneously developed. The stakeholders are not the same for every country while the factors contributing to its growth or decline differ across the regions. Additionally, the new world countries seem to give great importance to the wine routes concept whereas the majority of the wineries are obliged to provide other facilities beyond basic functional ones. The data illustrated in this section reveal a paramount performance of the new world countries despite their relatively recent implication in oenotourism. Their performance results and their marketing efforts have drawn the attention of the researchers, as there is a growing body of literature concerning the phenomenon. Therefore, the studies published so far, largely concern the countries of the New World. The studies of Hall, Sharples, Cambourne, Macionis, Mitchell and Johnson (2000), Dodd and Beverland (2001), Charters and Ali-knight (2002) and Getz and Brown (2006b) refer to wine tourism development at these countries.

The table 3.1 summarizes some critical observations concerning the literature review of 35 journals and 2 scientific books relative to wine tourism worldwide. The table verifies that most of the studies so far concern the emerging markets of the new world, with Canada and Australia pulling the most attention. However, there is also a satisfying interest towards the European countries where Italy and Spain are the focus of interest. Another interesting fact is that most of the studies approach wine tourism through the supply side. Performance of the wineries, vineyards, wine festivals and wine routes as a whole is of critical importance for researchers to assess the impacts of the phenomenon. However, there is a growing interest towards segmenting wine tourists and assessing the wine tourism experience through the demand side. Policies and marketing strategies also concern the academia. Beyond infrastructure and the prestige of the wine region's brand name, marketing

campaigns constitute one of the most effective promoting and supporting tools for developing wine tourism in a region.

Table 3.1: Literature review of the international wine tourism development

Field of interest	Number of journals
• Old World	17
○ Spain	4
○ France	2 ⁷
○ Italy	5
○ Germany	1
○ Austria	1
○ Greece	4
• New World	22
○ Australia	5 ⁸
○ New Zealand	4
○ Canada	7
○ Chile	3
○ South Africa	3
Demand side	11 ⁹
Supply side	30
• Interest focus	
○ Wine tourism in general	17
○ Wine routes	11
○ Wine tourists	2
○ Policies/marketing strategies	4
○ performance	3

⁷ The paper of Preston (2009) concerns both France and Australia, so it is included in both countries.

⁸ Similarly, the paper of Hall et al. (1997) concerns both Australia and New Zealand, so it is included in both countries.

⁹ The papers of Charters and Menival (2011), O’Neil and Palmer (2004), Mitchell and Hall (2003) and Wade et al. (2010) approach wine tourism from both the demand and supply side. Thus, these 4 studies are included in the supply side category as well.

Hence, the present study, in consistency with the literature so far, is about to examine wine tourism development from a supply side view in France, Italy and Australia. These three case studies aim to provide a more insightful view of the phenomenon and to be seen as a lesson for the case of Central Macedonia.

3.4 Case studies of wine tourism

3.4.1 Wine tourism in France

a. Wine tourism in general

Undoubtedly, France enjoys the leading position of the world's tourism destination with the largest amount of international visitors (Hall et al., 2000). Besides that, French wines constitute a significant feature of the country's culture and they are globally acknowledged for their quality and authenticity (Waller, 2006). In fact, the viticulture in France yields around € 20 billion per annum, while it employs 500.000 personnel. Moreover, the French wine production accounts for the 40% of the value of the food processing industry in the country (Waller, 2006: 2). However, the country's wine industry so far, was more oriented to its wines rather than in attracting tourists and offering them a unique wine tourism experience (French Wines Bulletin, 2013). Moreover, despite the strong brand name of the French wines, the country is facing an increasing competition from the emerging wine markets of the New World (Hall et al., 2000). In addition, there is a common perception worldwide that wine tourism in France is less developed and organized than the one offered by the New World countries (Charters and Menival, 2011).

Perhaps it may be the case, as Waller (2006) claims that the burden of the wine industry's tradition hinders the transformation of wine into a leisure product. Nevertheless, wine tourism is not a new phenomenon in France. For example, the first wine route in Alsace has been established in the 1950s (French Wines Bulletin, 2013). More systematic attention was given to wine tourism during the 1980s as the "crise viticole" brought the French wine producers to deal with unfavorable conditions of production and wine sales. Thus, they turned into wine tourism in order to increase their sales at the cellar door (Charters and Menival, 2011; Hall et al., 2000).

Ever since, France is leading other countries in the provision of wine tourism experiences with the regions of Beaujolais, Bordeaux, Burgundy, Champagne, Côtes-du-Rhône and Provence being the most successful ones (O'Neil and Palmer, 2004). In 2004 for instance, France attracted about 7.5 million wine tourists. The 2.5 million of them were foreigners (Official Chamber of Commerce and Industry of Valladolid, 2005 in Marzo-Navarro and Pedraja-Inglesias, 2010). Yet, the perception that wine tourism in France is relatively less developed remains (Waller, 2006).

b. Supply side of wine tourism

According to Hall et al. (2000) the supply of wine tourism consists of resources coming from both industries. Thus, under the supply of wine tourism one can find wineries, winegrowers, vineyards, oenological specialists, festivals, shows, wine tours, restaurants and accommodation. The rural landscape is also part of the wine tourism experience and should be included in the supply side (Carmichael, 2005 in Mitchell et al., 2012: 312). Moreover, government may involve in this practice but the extent of its involvement differs across the countries (Hall et al., 2000 in Waller, 2006).

In the case of the French supply side of wine tourism, apart from the accommodation and dining service providers and the rural landscape, it consists of wine makers, either/both smaller cellars and large producers (the so-called "houses"), the vigneron, which are the owners of the vineyards, wine cooperatives and tourism organizations (Hall et al., 2000; Charters and Menival, 2011; Mitchell et al., 2012; Preston, 2008). As far as the winemakers are concerned, not all of them consider themselves part of the wine tourism supply. In particular, a study of Charters and Menival (2011) revealed that there are three categories of wine makers in France relative to wine tourism: those who are more targeted towards exports and consider the phenomenon irrelevant with their core business; rather, they even consider that wine tourism can damage the image of their product. The second group consists of those producers who are part of wine tourism and they practice it either to increase their product volume or to enhance the image both of their product and the region. The last category of wine producers comprises those who are not opponents of wine tourism but are not involved in it since they consider it falls under the duty of the "houses" to practice it.

Furthermore, the national Wine Tourism Council (CSO¹⁰) is also involved in wine tourism since its aim is to develop wine tourism in the country through training, information and networking activities (French Wines Bulletin, 2013). With regards to the governmental involvement in wine tourism, Hall et al. (2000 in Waller, 2006) argues that the French government does regulate the wine industry but it is not actively implicated in the wine tourism practice. Nevertheless, a recent political interest for the due practice has been recorded (Dubrule, 2007). Even more, the agriculture ministry moved on in the formation of the national Wine Tourism Council in 2009 to promote wine tourism further (Charters and Menival, 2011). However, tourism in general is under the responsibility of the transport, housing and tourism department while each geographical department of the country has a regional organization to regulate and promote tourism in the region (Charters and Menival, 2011: 103).

c. Marketing projects for wine tourism

In order to initiate the visitors in the world of wine, both wine producers and tourism organizations have developed several wine-related attractions (Hall et al., 2000). Marketing and promotion tools vary from a single sign displayed outside the cellar buildings and inclusion in wine guides (usually for the smaller cellars) to developing «professional and commercially run tourist attractions» for the larger wineries (Hall et al., 2000: 68). Moreover, the CSO has developed two promotional tools to enhance wine regions to promote wine tourism further. These are the Prix National de l'Oenotourisme and the Vignobles & Découvertes to be awarded to the most successful initiatives and the most collective actions respectively (French Wines Bulletin, 2013).

In addition, another initiative operated by the wine and the tourism industry is the Route Touristique du Champagne which leads tourists through the champagne producing villages of the region. This initiative aims to encourage tourists to visit also the smaller wineries and vigneronns (Mitchell et al., 2012). Finally, the CIVA¹¹ in the wine region of Alsace invested in 2003 € 5.6 million for the improvement of the welcoming facilities of the region and to highlight the educational dimension of wine tourism. For the future, CIVA intends to train the foreign language skills of cellar staff in order to attract younger visitors to the wineries

¹⁰ The Conseil Supérieur de l'Oenotourisme (CSO) was created in 2009 (ATOOUT FRANCE, 2013).

¹¹ Comité Interprofessionnel des Vins d'Alsace (CIVA); coordinates and harmonizes the various actions of the Alsatian vineyard, and directs the policy of the production according to the economic situation (Waller, 2006: iv).

while it designs cooperative partnerships with museums and other cultural attractions (Waller, 2006).

d. The Wine Routes of Alsace

The Alsace wine region was the first to develop wine tourism in its premises since the first wine route in France was established there in 1953 (Waller, 2006). The wine route of Alsace extends for more than 170 km from north to south along the eastern foothills of the Vosges (Vins d'Alsace, 2013). Among the reasons contributing to its popularity worldwide is its exceptional natural beauty, its simple course and the strong sense of connection its visitors feel with the place and the winemakers and growers (Vins d'Alsace, 2013). The route passes through some of the most picturesque villages of the country while it offers pedagogic trails in order to initiate visitors into the various professions present in the wine industry (Waller, 2006). Nowadays, Alsace consists of 170 km wine routes, 48 walking trails along the vineyards; it provides organized circuits and holidays in the vineyard, oenology training, wine museums, wine festivals, wine fairs and auction shows. All these features rank Alsace second in wine tourism development right after Burgundy (Waller, 2006: 38).

e. Advantages and disadvantages from the wine routes

As already been mentioned, France turned into wine tourism more systematically in order to overcome the economic decline faced by the wine industry during the 1980s through increasing sales at the cellar door (Hall et al., 2000). Indeed, the biggest benefit of the wine routes in Alsace is the increase in the winemakers' income through the direct sales at the cellar (Menival and Yuan Han, 2011). In addition though, wine tourism yielded more benefits to the region. It enhances a long-term loyalty to the region by the visitors whereas it continuously improves the image of the region and of the Alsatian wines as well. Moreover, wine tourism has a positive impact on export sales as it impacts positively on the region's image within France short-term and long-term for the foreign markets (Menival and Yuan Han, 2011). The impact of post visit on wine consumption is also significant (Houghton, 2002 in Menival and Yuan Han, 2011). However, the study of Waller (2006) reveals that wine tourism is not of high priority for the professionals of the industry. Finally, as far as potential disadvantages for the wine tourism in France is concerned, these do not receive significant attention from scholars so far.

3.4.2 Wine tourism in Italy

a. Wine tourism in general

Italy is among the leading world tourism destinations. Its popularity is strongly linked to its vast pool of cultural attractions and historical heritage (Romano and Natilli, 2009). However, a significant amount of the country's rural regions are excluded from tourist flows. Hence, wine tourism is considered to fit perfectly the Italian rural regions (Presenza et al., 2010). In particular, the Italian peninsula is covered across its whole length by wine regions providing a promising potential for rural development through wine tourism (Gatti et al., 2003).

Moreover, the Italian wine routes are seen as a means of linking the agro-food production to development of rural spaces (Wiskerke and van der Ploeg, 2004). In addition, the abolishment of the Ministry for Tourism in 1993, along with the fragmented accommodation capacity and the fragmented nature of the wine industry in the country, motivated the design of 140 Italian wine routes in the regions of Abruzzo, Basilicata, Calabria, Campania, Umbria, Marche and Tuscany (Romano and Natilli, 2009). The wine routes were an initiative of the Movimento Turismo del Vino, which was established in 1993 and of the Associazione delle Città del Vino which was also established to promote unfavorable wine-dependent regions (Romano and Natilli, 2009). The Italian wine routes were officially recognized in 1999 (Romano and Natilli, 2009).

Today, according to the figures given by the Movimento Turismo del Vino, wine tourism in Italy yields about € 2.5 million annually, while it predicts further growth prospects (Movimento Turismo del Vino, 2012). Furthermore, wine is ranked third in the motivation list of the foreign tourists visiting Italy. Almost 3.5 million tourists visit the country's wineries per year (Movimento Turismo del Vino, 2012).

b. Supply side of wine tourism

Next to the accommodation and dining service providers, the Italian supply side of wine tourism consists of wine producers, wine associations, economic actors often linked to the distribution of the wine products, personnel related to eno-gastronomic activities, rural and agro-tourism entrepreneurs, representatives of the local communities, institutions and regional planners (Wiskerke and van der Ploeg, 2004: 324; Romano and Natilli, 2009). However, the most principal actors of the supply side are the wine cellars, the vineyards and local municipalities which all these three construct the wine tourism offering (Asero and

Patti, 2009). According to the same authors, individual companies together though with public/private organizations are among the success factors of the wine tourism in Italy.

With regards to the wineries involved in this kind of tourism, the majority of them are small firms. Moreover, wine producers in Italy follow a business orientation more towards supply and promotion of differentiated activities like wine tasting, visitor facilities and country tours than being focused only on their core activity which is production and sale of wine (Presenza et al., 2012: 52-53). Furthermore, significant work is being done by the Movimento Turismo del Vino which was set up in 1993 and currently has more than 900 Italian wine firms (Presenza et al., 2012). The MTV aims at increasing wine tourism in the country, promoting environmental protection, increasing the agriculture quality, promoting the Italian wine culture, qualifying the wineries' tourist services and enhancing the image, the income and employment in the wine regions (MTV, 2013). The Associazione delle Città del Vino is also part of the supply. To end with, it seems that Italy pays significant attention to the «wine territories as amenities» (Gatti et al., 2003: 231).

The wine region itself with its vineyards, cellars and the agricultural landscape are strongly connected to the wine activity. Thus, the wine territories are seen as «rural amenities» strictly embedded to the wine territory. These carry a social value, apart from an economic one derived specifically from the wine production activity and therefore, needs to be promoted as well (Gatti et al., 2003: 231).

c. Marketing projects for wine tourism

In terms of marketing and promotion of wine tourism in Italy, the Movimento Turismo del Vino is the original player. The most important and popular national wine-related events are the “Cantine Aperte” which originated from Tuscany and at the moment it is spread to the other Italian wine regions too and the “Calici di Stelle” which is sponsored by the Associazione delle Città del Vino (Romano and Natilli, 2009). The “Cantine Aperte” event (Open Day at the wineries) is organized each year on the last Sunday on May. The concept is for the wineries to be open for all visitors free of charge. The later event constitutes a traditional summer event which takes place in August, on ST. Laurence's night when quality wines are offered by the association in the main squares of tourism sites (Presenza et al., 2012). Additionally, there is also another event organized, the “Benvenuta Vendemmia” (Welcome Grape Harvest) for the visitors to experience the grape harvesting in the countryside. In order for the wineries to accommodate this event, the Association has issued a Handbook for Hospitality to improve the wine tourism product offered by the wineries.

Apart from these initiatives, the MTV takes actions in other fields too; it participate in fairs markets, it organizes international seminars to promote cultural exchanges with other wine-related European partners while it communicates wine tourism through brochures, leaflets and guides (Presenza et al., 2012). It has also the responsibility of design and development of wine tourism itineraries and guided-wine tasting events often in collaboration with local tours operators (Presenza et al., 2012: 56). However, the study of Romano and Natilli (2009) indicates that wine events in Italy are not well organized and marketed. Tourists demand better communication of the events through the web or other traditional ways in order to increase participation when they are present in wine territories. Moreover, the large amount of small firms hampers the effectiveness of the marketing tools applied (Romano and Natilli, 2009).

d. The wine routes of Tuscany

There is a strong belief in Italy in the dynamic of a collective action. Wine routes are seen as an outcome of a collective action. Even more, they represent a concrete example of synergy and coherence working together for a specific cause; to promote the region and a series of local products (Wiskerke and van der Ploeg, 2004; Brunori and Rossi, 2000). Tuscany is one of the most famous Italian wine regions with worldwide renowned vineyards and wines (Asero and Patti, 2009). Moreover, Tuscany enjoys its strategic location among famous tourist cities of the country like Florence and Pisa while its medieval architecture and charm compensate the region for an absence of cultural “hot spots” (Wiskerke and van der Ploeg, 2004: 324). What is more, it is internationally acknowledged for its wine production of high quality with three Protected Denomination of Origin (PDO) areas: Montescudaio, Bolgheri and Val di Cornia (Wiskerke and van der Ploeg, 2004).

To continue with, there are 14 established wine routes in the wine region of Tuscany. However, the most famous one and one of the most developed in the country is the Costa degli Etruschi, which extends to the province of Livorno for more than 80% of its coverage. The idea for the initiative of the Costa degli Etruschi wine route dates back to 1993 during the conference of the Italian Association of Sommeliers (AIS). Crucial contributor to the realization of the wine route was the administrative office of the province of Livorno whose active implication in the concept was exceptional compared to other similar initiatives in the country; it even stimulated the set up of a Wine route Consortium to encourage entrepreneurs to cooperate in this cause, promote their wine internationally and improve the quality of their product as well. After legal regulations, the wine route was established in

1994 whereas the Consortium today comprises 84 members. These are wine-growing farms, agri-tourist farms, producers of local products like honey, oil and salami, wine bars, wine shops, restaurants, camping sites, nature parks and hotels (Brunori and Rossi, 2000: 412; Wiskerke and van der Ploeg, 2004). Thus, the members of the wine route have been engaged in promoting not only the region's quality wine but also the rural traditions and the typical agriculture and gastronomy of the region (Asero and Patti, 2009).

e. Advantages and disadvantages from the wine routes

Although a general perception deriving from literature is that not all wine routes established across wine regions are successful, there is not much attention given to drawbacks of wine tourism in Italy. Nevertheless, the benefits of the wine route are impressive. These are both economic and social ones. The wine route attracts more tourists to the region while it increases their awareness of the distinctive attributes of the region. Thus, the general competitiveness of the region increases (Brunori and Rossi, 2000). Furthermore, the increased tourist flow in the region enhances the demand for directly sold local products and services and at the same time the increased consumers' awareness of the territory, improves its image and allows it to differentiate from other regions (Wiskerke and van der Ploeg, 2004).

At the winery level, the most apparent effect is reflected in prices. Product prices in the wineries-members of the wine route are significantly higher than those in the conventional farms (Wiskerke and van der Ploeg, 2004; Brunori and Rossi, 2000). Hence, the economic impact of a wine route can be divided into three separate effects, namely the price effect, the selling effect and the production effect. The first one concerns the prices of the directly sold wines already mentioned; the selling effect implies a shift on the selling patterns of the wineries from wholesale to direct sales and the production effect implies changes in the working and production patterns. For example, there is a shift from unbottled to bottled wine. Moreover, increased profitability of the farms motivates the exercise of more activities operated in the farm (Brunori and Rossi, 2000).

Finally, the social impact is reflected in the improved reputation of the region and on a synergy effect. The latter is apparent not only in the differentiated farms' operations but also in the way these are now organized and in their relationship with the environment as well (Brunori and Rossi, 2000).

3.4.3 Wine tourism in Australia

a. Wine tourism in general

Australia is among the popular world tourism destinations. However, the majority of the tourist flows does not cross the boundaries of the big cities like Sydney and Perth. Hence, one of the difficulties faced by the country is to attract international visitors to its rural regions. The paramount performance of the Australian wine exports has induced an international interest for the wine regions of the country (Beames, 2003). The flourish of the wine exports reflects Australia's tradition in wine production and the fact that the later constitutes one of the constant growing industries in the country (Hall et al., 2000). Thus, Australia has long recognized wine as a strong tourism asset and as a means of enhancing regional growth. Therefore, the country has set the development of wine tourism as a national priority since the end of the 1990s by providing a grant of AUD\$ 70.000 to the Winemakers' Federation of Australia to develop a national wine tourism strategy (Brown and Getz, 2005; Beames, 2003).

Today, the country lists more than 500 wineries and has more than 60 wine regions; the most important of them are New South Wales, South Australia, Victoria, Western Australia, Queensland and Tasmania (Waller, 2006). Furthermore, there has been a remarkable progress in the wine tourism sector the last decade. The total number of visitors to the 1.647 Australian wineries amounts to almost 5 million (Pratt, 2011), while at the same time the total expenditure of the wine tourists in the country are about AUD\$ 7.1 million (Quadri-Felitti and Fiore, 2012). Remarkable is also the rapid tourism growth of the Margaret River and Swan Valley wine regions (Getz and Brown, 2006a). In addition, 11% out of the 5 million international tourists to Australia visit the country's wineries. However, despite its growth, the wine tourism sector in Australia still lacks much in organization, attitude, planning and infrastructure facilities (Beames, 2003).

b. Supply side of wine tourism

The supply side of Australian wine tourism consists both of actors from the wine and the tourism industry (Carlsen and Dowling, 1998). Moreover, since wine tourism is seen as a tool for rural development, Australia's Federal and State governments are also involved in this practice. Having recognized the benefits of promoting wine regions, regional communities, regional tourism associations and wine tourism bodies are also part of the supply side (Hall

et al.). However, due to a series of challenges identified by Beames (2003), not all of the above players are actively involved in wine tourism.

To begin with, the wineries of the country are either “small family owned” or large sized wineries. Although small wineries are the 50% of the total wineries, the large ones and in particular 4 major companies account for the 90% of wine production in the country (Hall et al., 2000; Waller, 2006). Moreover, the small ones treat wine tourism as a source of increasing their income and sales while the large ones consider it as a means of promoting their products (Hall et al., 2000). Nevertheless, one major issue is that wine tourism often constitutes a secondary or even tertiary activity for the winemakers. They are strongly focused towards production, have little or no management and promotion skills and the lack of official data and research hinders their capability of extracting conclusions concerning their proportion of sales to the tourists visiting their facility (Hall et al., 2000; Beames, 2003).

In addition, there is a “cottage-industry mentality towards wine tourism which can make the wine tourism experience a real frustrating one for the tourists on the one hand while on the other, it has not been fully embraced by the total of the tourism industry (Beames, 2003). With regards to the national government’s and States’ involvement, several Australian states have set up wine tourism bodies aiming at coordinating and facilitating wine tourism development. The Victorian State Government for example, established in 1993 the Victorian Wineries Tourism Council (VWTC). Respectively, the state of Southern Australia has established the Southern Australia Wine Tourism Council (SAWTC) in 1996 in order to champion wine tourism in the state. The New South Wales has set up the New South Wales Culinary Tourism Advisory Committee to foster wine tourism development in the region and create inter and intra industry linkages (Hall et al., 1997) Moreover, in 1997 the federal’s government’s Office of National Tourism granted the Winemakers’ Federation of Australia with AUD\$ 70.000 under the framework of the national tourism development program so as to develop a national wine tourism strategy. Nevertheless, despite a white paper having been released in 1999, little has been made so far towards this strategy (Hall et al.; Beames, 2003).

Moving on at the regional level, despite the existence of 56 Australian state and regional vignerons’ associations, their involvement is of little importance since they do not consider tourism being part of their activities (Hall et al.). Nevertheless, there is an exceptional example of effective regional wine industry association’s involvement, that of the Barossa Wine and Tourism Association (BWTA) which is engaged in communicative and promotional

marketing of the entire Barossa region (Hall et al.). To conclude with, the general view concerning the supply side of wine tourism in Australia is that there is a lack of comprehension by the local authorities of the requirements for an effective tourism development.

c. Marketing projects for wine tourism

Marketing and promotion of wine tourism by the competent bodies in the country is of great significance in order to improve the destination's image through it. Thus, wine tourism practiced at regional level incorporates activities having both wine and non-wine related features. Consequently, the aim of the local authorities is that tourists are attracted to the area both for the region's features and for the capability of being offered a wine tourism experience (Carlsen and Dowling, 1998). The annual Al Fresco concerts at Leeuwin Estate in Margaret River for instance, aims to increase awareness for the area both domestically and internationally.

Marketing strategies in general revolve around festivals, shows and events, gastronomy, sightseeing, industrial, cultural and nature-based tours, all having wine as a central theme (Carlsen and Dowling, 1998). Other marketing projects are funded by the Commonwealth government programmes like the "Legends, Wine and High Country" wine and food trail, the provision of a signage system for the Hunter Valley and Mudgee wine regions and the establishment of visitor information and interpretation centers in the regions of McLaren Vale and Barossa in South Australia (Carlsen and Dowling, 1998). Apparently, the Australian wine tourism bodies and other competent authorities have not developed the concept of the "Wine Routes" like European countries have done. They are more oriented towards the design of wine and food trails but still, they are less organized and promoted as a trademark like the wine routes.

d. The wine region of Margaret River

The Margaret River area is located in the Western Australia's State and is one of the top holiday destinations since it's a meeting point for surfers worldwide, but is also one of the most popular wine regions of the country. The first grape vines were planted there in 1967, so it is quite a young wine producing region, while its most renowned varieties are cabernet sauvignon and chardonnay (Wine and food regions of WA, 2013). The three most popular activities in Margaret River are eating out, visiting wineries and going to the beach. The region has 102 wineries while the 15 out of them run a restaurant facility too. 14 wineries

offer tours and five of them own accommodation facilities. Moreover, a wine route with an extensive signage scheme directs visitors to the accessible wineries (Mitchell et al., 2012).

The population of Margaret River is rather new, in particular those occupied in the wine industry. However, the viticulture landscape of the area remains relatively unfragmented compared to that of Champagne. It is also worth mentioning that the “concept of mateship is core to the Australian psyche”. This feeling is even stronger in the rural areas where people are motivated to coordinate in order to survive. The influence of the mateship concept is apparent in the Margaret River where winemakers often recommend visits to the other wineries as well. This cooperation among wineries makes the wine tourism experience more coherent (Mitchell et al., 2012: 329).

Finally, “Cave Roads” is one of the most scenic drive routes in Australia which links a series of wineries, galleries and coastal attractions from the north to the south of the Margaret River wine region (Wine and food regions of WA, 2013). Yet, it is already mentioned that wine routes in Australia do not receive the same attention as in Europe and they are not promoted as a single attraction. In fact, Australians pay more attention in promoting trademarks events that incorporate all features of the region, both wine and non-wine related.

Thus, the Margaret River hosts a number of food and wine festivals but one of the most important ones is the annual Margaret River International Food and Wine Gourmet Escape which lasts four days and is being held each November. Aim of this event is to promote the wine region of Margaret River as a whole both to locals and international visitors (Visit the Margaret River in WA, 2013).

e. Advantages and disadvantages of wine tourism

Despite the fact there is a lack of data concerning the supply of wine tourism in order to provide information for the cellar door sales to visitors for example, there is also a lack of regional expenditure data by wine tourists in order to assess the impact of wine tourism in Australia and motivate public/private investments (Carlsen and Dowling, 1998). However, some conclusions can be made with regards to wine tourism.

First and foremost, it should be noted that there is not much literature discourse concerning potential disadvantages of wine tourism. On the contrary, it has boosted international tourist arrivals as the international inbound tourist numbers have been doubled during 1999 and 2008. Moreover, the increasing promotion campaign of wine and food tourism as part

of the Australia's tourism experience has improved the overall tourism image of the country. The latter initiates also the ATC and other state tourist associations to involve more actively in wine tourism. Thus, the success of wine tourism was acknowledged by the Federal and States' governments which now recognize its importance. Furthermore, wine tourism has induced investments, mostly private, to develop infrastructure and other tourist facilities. Last but not least, international and domestic interest for the Australian wines and grapevines regions has been increased as well as awareness for these two (Beames, 2003).

3.5 Critical overview of the case studies

Some major differences in the wine tourism practice between the Old and the New World countries have been identified from the case studies' overview.

To begin with, there is a general perception in the academic community that wine tourism is less developed in Europe than it is in the New World, despite its long tradition in the wine culture. This can be explained by the fact that the European wine regions are inclined to enter the wine tourism field to increase their sales and respond to sudden economic declines in the wine industry. On the contrary, the New World countries consider wine tourism as a means of enhancing the profitability of the wine industry on the one hand but also as a tool for long-term regional prosperity (Charters, 2009; Hall et al., 2000). The summarizing Tables 3.2, 3.3 and 3.4 verify this general perception and also provide further conclusions upon a critical overview of the case studies.

Table 3.2: Critical overview of wine tourism in general in the 3 case studies

Key elements	France	Italy	Australia
Motivation for wine tourism	Respond to “crise viticole”, increase sales	Rural development, Link agro-food production to rural development	Wine as a strong tourism asset, enhance regional growth
Wine routes	Wine routes of Alsace	Wine routes of Tuscany; the Costa degli Etruschi wine route	Margaret River wine region
Advantages and disadvantages of wine tourism	<ul style="list-style-type: none"> • Economic: increases winemakers’ income & export sales, post-visit wine consumption • Social: long-term loyalty to the region, improves image of the region & wines 	<ul style="list-style-type: none"> • Economic: price effect, selling effect, production effect • Social: increased competitiveness of the region, synergy effect 	<ul style="list-style-type: none"> • Economic: increased tourist flows, induces investments, • Social: improved overall tourism image, induces competent bodies to involve actively, increases awareness of wine regions & wines, synergy effect

From the Table 3.2 the difference in motivation among the three countries is apparent. The “crise viticole” in France have turned the country’s winemakers into wine tourism whilst wine tourism in Australia has been developed in order to promote rural regions of the country and improve the overall image of those wine regions. However, wine tourism as a source of income for the winemakers is more the mentality of the northern and central European countries. Southern countries like Italy are oriented to the phenomenon in order to develop depressed regions with strong wine production prospects. Indeed, Italy’s rural

regions were facing difficulties as they were excluded from tourism flows. Thus, the country's competent authorities regard wine tourism as a promising potential for rural growth. Consequently, it seems that Italy is closest to the mentality of the New World countries like Australia concerning the reasons developing wine tourism rather than to its neighbors. Another difference identified between the two worlds is the significance given to the concept of Wine Routes. This is more developed and embedded in the Old World countries, namely France and Italy than it is in Australia. The latter aspires to promote the wine region as a whole entity and not focus only on wine routes.

Moreover, as far as the advantages and disadvantages are concerned in the three countries, these are more or less similar. Increased sales and increased awareness of the region and wines produced there are common in these countries. Improved overall image of the region is also a common benefit. However, the synergy effect is present only in Italy and Australia which is partly explained by the way the supply side of wine tourism is organized and the philosophy of the winemakers and vineyards owners. Another impact present only in Australia is the fact that success of wine tourism induces the involvement of competent bodies. This reveals a difference in the extent state and local authorities are implicated in wine tourism.

In consistency with the aforementioned, fewer stakeholders are implicated in Europe relative to the New World countries (Table 3.3). The largest number of actors involved in wine tourism is found in Australia. Moreover, the State and local municipalities as well contribute more to its development in Australia than they do in Europe. France's government is only recently inclined to implicate in wine tourism through the Agriculture Ministry. In Italy, it seems that local authorities are more active than the government itself; however, in both European countries their role is rather supportive. The business initiatives are mostly private ones.

Table 3.3: Critical overview of the supply side of wine tourism in the 3 case studies

Key elements	France	Italy	Australia
Supply side	Tourism services, rural landscape, winemakers, vigneroni, wine cooperatives, tourism organizations, CSO	Tourism services, agricultural landscape, wine cellars, vineyards, local municipalities, institutions, regional planners, the MTV, the Associazione delle Citta del Vino	Actors from both wine & tourism industry, Federal government, States' governments, regional tourism associations, wine tourism bodies
Role of local authorities/government	Supportive role, not actively involved	Active role of the local authorities	Active role of the government and regional authorities-national wine tourism strategy
Marketing projects	Wine-related attractions, promote smaller wineries & vigneroni, improve facilities, educate cellar staff, cooperative partnerships	Wine-related events, participation in fairs markets, organization of international seminars, design wine tourism itineraries	Wine-related festivals, shows & events, gastronomy, sightseeing, tours, promote region as a whole

Another critical point identified in the case studies is the difference in winemakers' mentality between the two worlds. Wine producers and vineyard owners in France are strongly devoted to "terroir" and regard grape and wine being of significant importance for the community, they demonstrate an individualistic behavior and no or little spirit of cooperation in terms of business and production. Their counterparts in Margaret Village on the contrary are more individualists towards the importance of the grapevines and wine for the community but they are highly cooperative when it comes to business and production. This differentiation emanates from the mateship and pastoral mentality of the Australians

and the high protectiveness of the French for their land. In addition, the synergy effect recorded in Italy reveals a cooperative and mutually supportive behavior of the country's winemakers and vineyards owners, similar to that of the Australians. This behavioral similarity may be induced also by the fact that motivation in these two countries is also similar and originates from their will to develop rural areas. The common goal of promoting the rural regions induces this spirit of cooperation.

Some final differences are identified in terms of marketing and promotion of wine tourism and in the way wineries function. In Europe there are a lot of wine festivals organized in wine routes and at single wineries, while in Australia the events organized aim to promote the whole rural region and are not related solely to wine. In addition, the European wineries, especially the small ones are focused more on wine tasting facilities while they often offer no or little extra activities. On the contrary, the wineries at Margaret River seek to provide more than wine tasting as they usually have dining and accommodation facilities as well.

In conclusion, wine tourism seems less organized and developed in Europe since the respective phenomenon in the New World countries receives more attention from the competent bodies. However, even within Europe there are critical differences among countries since the Mediterranean ones identify themselves more with the New World countries. Furthermore, some conclusions can be extracted from this critical overview of the case studies (Table 3.4) concerning the success factors and inhibitors of wine tourism in general.

Being already a popular world tourism destination is a great asset since these destinations already attract a great amount of tourists. However, as indicated by Italy and Australia, this does not necessarily mean that all regions enjoy the benefits of tourism. Usually, the rural landscape does not receive much attention from tourists. Therefore, wine tourism is one of the ways to make rural regions also renowned, like cultural capitals. Thus, organizing and promoting wine-related events not only centered on wine itself, but also promoting and enhancing awareness of other features of the region as well, like it is the case in Australia. This increases awareness of the region as a whole and generates post-visits which results in larger tourism flows to the countryside. Moreover, cooperation and unity spirit among the major supply players like wineries and vineyards increases the quality of the wine tourism experience for the tourist on one hand and makes marketing and communication tools more effective on the other. In addition, establishing a strong brand name of a region's wine products, increases familiarity with the region and induces the interest to visit it. Even more,

a long history and tradition in the wine industry also plays its part in establishing a strong brand name of the product and increasing awareness of the wine region. That is why countries like France, intend more to promote their wines rather than the region as a whole, since the French wine regions like Burgundy, Bordeaux and Champagne are already globally renowned. Finally, the role of government and municipal authorities as well, are crucial contributors to the success of wine tourism. Individual initiatives often need the support of the state either by financing marketing campaigns or investing in infrastructure. Regulations upon the wine industry also affect how wine tourism is practiced.

Nevertheless, the wine industry itself can be an inhibitor of succeeding in wine tourism. A fragmented nature of the industry with a large number of small firms can hinder the effectiveness of the wine tourism development. Moreover, wine firms strictly focused on production are less willing to participate in it. Besides, an individualistic behavior exerted by wine firms and vineyard owners also inhibits wine tourism to be developed any further. Additionally, in the case of France, the long tradition of the country in winemaking often functions as a burden for the winemakers to involve in wine tourism since it prevents them from turning wine into a leisure product. Furthermore, a “cottage-industry” mentality also complicates the wine tourism experience for the tourist. What is more, marketing tools can be either success factors or barriers for wine tourism development. If these projects are not well organized and communicated, wine regions are not able to increase their attractiveness. The role of government and local authorities is also ambiguous. Lack of comprehension by the competent bodies and lack of support towards the various stakeholders, also inhibit future growth. Finally, a lack of official statistical data does not contribute any further since the effects of wine tourism are not countable for the local authorities and other actors to be involved in it.

Consequently, the role of the government, the nature of the wine industry and a long tradition in it, the effectiveness of marketing campaigns and an already positive tourism image of the destination are determinants of wine tourism development. Nevertheless, whether they constitute success factors or barriers depends on the degree of their valorization.

Table 3.4: Determinants of wine tourism in the three case studies

Countries	Success factors	Barriers
France	<ul style="list-style-type: none"> • Long tradition in the wine industry • Leading position in world's tourism destinations • Strong brand name of French wines • Beautiful rural landscape • Investments in facilities and staff's education • Strong promotional tools 	<ul style="list-style-type: none"> • Burden of the wine industry's tradition • Not all winemakers interested in wine tourism • Individualistic behavior of winemakers & vigneron
Italy	<ul style="list-style-type: none"> • Long tradition in the wine industry • Leading position in world's tourism destinations • A vast pool of wine regions • Initiatives of individual companies • Active participation of public/private organizations • Cooperative spirit of winemakers 	<ul style="list-style-type: none"> • Rural regions excluded from tourism • Fragmented accommodation capacity • Fragmented nature of wine industry • Poor marketing and communication tools of the wine events
Australia	<ul style="list-style-type: none"> • Popular world tourism destination • Flourish of wine exports • A national wine tourism strategy • Promotion of the whole wine region • Mateship mentality among winemakers 	<ul style="list-style-type: none"> • Rural regions excluded from tourism • Polarized wine industry • Strong production focus of the wine firms • "cottage-industry" mentality • Lack of comprehension by local authorities • Lack of statistical data

3.6 Conclusion

In this chapter a general overview of the wine tourism practice worldwide has been presented, with a detailed focus on three countries, those of France, Italy, and Australia. A brief review of the wine market internationally has revealed that both wine production and wine consumption undergo a declining trend. The regressive figures are more prominent in

the European countries, which are also facing the dynamic growth of the New World emerging markets. In this context, wine tourism is not only seen as a means of rural resurgence but also as a means of enhancing the declining wine industry; increasing consumers' association with a wine region and post-visit consumption resulting in increasing sales and income for the wine industry supply.

Therefore, motivation for entering the wine tourism business differs according to the needs of each market. The international overview and the case studies of the due phenomenon indicate that New World countries regard wine tourism as a tool for rural development while the European ones, which are more saturated markets, practice it in order to enhance the wine sector's economy. However, southern European countries, like Italy, are closest to the New World philosophy of rural growth, like Australia. Despite the different motives and practices, the major success factors and barriers of championing wine tourism, are common worldwide. These are, as identified from the case studies, the role of the government, the nature of the wine industry and a long tradition in it, the effectiveness of marketing campaigns and an already positive tourism image of the destination.

Apparently, these conclusions concerning the wine market worldwide and the wine tourism development on three particular countries can be seen as a guide for what will be the situation like in the case of Central Macedonia (Greece). In accordance with the Table 3.4, the following features are more likely to be seen in that case too: a long tradition in the winemaking, an already strong image as a coastal and beach tourism destination, an exclusion of rural areas from tourism and an active role of the public/private organizations. Moreover, poor marketing and communication tools are also anticipated to be seen along with a fragmented wine industry. Finally, advantages and disadvantages of wine tourism and determinants of its development in general are expected to be similar with all three countries.

In any case, whether these assumptions stand true or not, remains to be seen in chapter 5, where the case of Central Macedonia is being presented.

4. Methodology

4.1 Introduction

The following chapter aims to describe and present the process and methodology adopted for the purposes of the study. A research paper comprises the following steps. First stage in the process is the definition of the research objectives, followed immediately by the collection of secondary data and the design of quantitative and / or qualitative research (Schiffman and Kanuk, 2000). This study followed a qualitative research with the form of a case study (Central Macedonia, Greece), whilst secondary data are presented in the previous chapters. Therefore, the data for Greece in general are based on existing studies/literature, while the case of Central Macedonia is based on interviews along with secondary ones like literature, policy reports, etc to complement the interview data. After collection and analysis of primary data, the research process is completed with the generation of conclusions and recommendations. The objectives on which the research was conducted in this present work are presented in Chapter 1 while its detailed methodological approach is being presented in the following sections.

4.2 The method

The entire methodological procedure is illustrated in the Figure 4.1. Initially, the main research question is identified and defined along with the research objectives in the first chapter. Afterwards, a systematic study of a variety of relevant literature sources was conducted, in order to clarify key concepts of the content and delimit the research topics, develop the theoretical framework of research questions and select the appropriate methodology for investigating them. In addition, a review of the existing literature (scientific articles, scientific books, theses) is essential for the integration of a research in the context of existing knowledge with regard to this topic. The literature review is then followed by a comparative analysis through case studies to be acquainted with the way wine tourism is being approached by other countries and what has been implemented relative to it. This

section will consist of cases from two countries of the Old World, namely Italy and France and one country of the New World, that of Australia.

Further to the stages already mentioned, the due study has been constructed upon a qualitative research. As identified in chapter two, one of the key conclusions from the literature review concerns the need for a multi-perspective approach of wine tourism (Getz, 2000). With respect to this need, it is estimated that the most appropriate approach to investigate the supply side of wine tourism is the use of primary qualitative research. In fact, since the 'quiet methodological revolution' over the last quarter of the 20th century, the qualitative inquiry has been considered-often conjointly used with quantitative methods-as the most appropriate research tool for the social sciences (Denzin and Yvonna, 1994:9). Moreover, as long as these science fields examine and deepen in the socially constructed nature of reality, while quantitative methods are known for measuring variables and not processes, qualitative methods appear to be more appropriate to investigate a transformation process by approaching reality as closely as possible. Thus, they are more suitable to answer how or why research questions (Yeung, 1995) in the sense that they can capture the individual's perspective, and what is more, capture the restrictions of daily life (Denzin and Yvonna, 1994). In addition to that, although quantitative methods are still the dominant ones, qualitative methods are continuously gaining ground in the tourism research field (Riley and Love, 2000, Xiao and Smith, 2006). That is of no wonder since tourism researchers aim to study and interpret the feelings and thoughts of people (Walle, 1997).

Therefore, the research strategy¹² adopted is that of a case study¹³-the case of Central Macedonia- while the method of collection and analysis is that of personal interviews, as the understanding of the behavior of the actors involved is a key factor for the development of wine tourism (Yuan et al., 2006, Dodds and Butler, 2010). In fact, due to its rich data collection within a certain context, a case study approach, serves well research questions concerning a thorough investigation of social or organizational processes (Cassel and Symon, 2004). Moreover, this research strategy is considered to be popular among social sciences because of its harmonization with the reader's own experience and consequently, this strategy is consistent with the individual's natural tendency to generalize (Stake, 1978). Thus, comparability among case studies is feasible and above all, it is intrinsic in this research strategy, as Gerring (2004) argues for. Therefore, the aforementioned among other

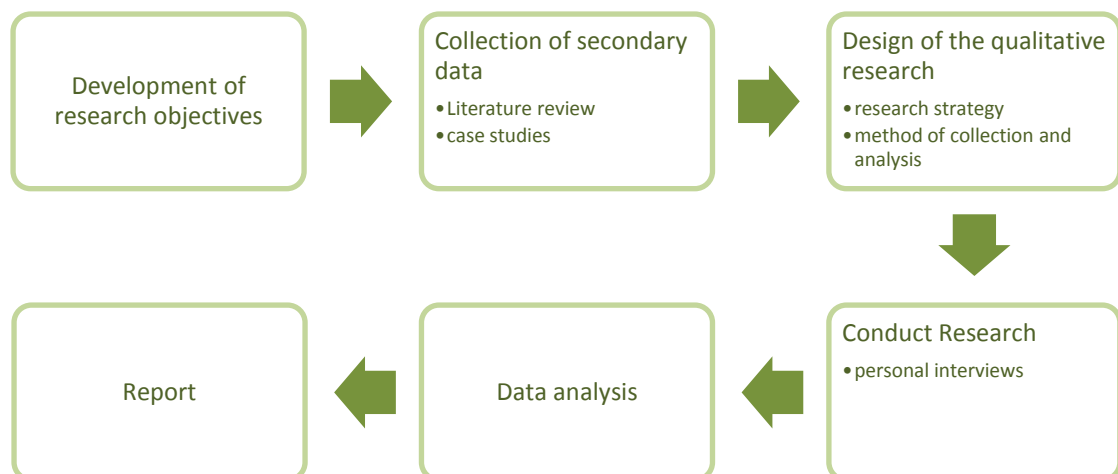
¹² A case study constitutes a research strategy, not a research method (Denzin and Lincoln, 2005).

¹³ The term case study refers to "a work that focuses its attention on a single example of a broader phenomenon (Gerring, 2004:341).

reasons, explain the extensive use of case studies in the tourism research field (Dann et al., 1988, Ritchie et al., 2005). Moreover, their “holistic-inductive nature” along with their proximity to reality due to the insider’s point of view, is in consistency with the socio-anthropological nature of tourism (Ritchie et al., 2005). As far as the method of collection and analysis is concerned, personal interviews are considered to be a more suitable method to investigate issues in depth since they allow the researcher to record the subject’s perspective and capture individual perceptions more effectively (Denzin and Yvonna, 1994).

In addition, the method of personal interviews is also used by Brunori and Rossi (2000) and Charters and Menival (2011) to examine the supply of wine tourism in Tuscany and Champagne respectfully. Finally, after collection and analysis of primary data, the research process continues in linking the results with the literature so as to end up in deriving certain conclusions and recommendations both for the actors involved in wine tourism and tourism researchers.

Figure 4.1: The method process



Source: Schiffman and Kanuk (2000; adjusted)

4.3 The study area

The present work studies wine tourism in the light of Greece, in which the marks of the recent financial crisis are apparent. Despite the economic recession of the country, tourism has long been an engine of generating income and job opportunities. Therefore, it will be interesting to explore the dynamic of an alternative form of tourism, other than mass tourism, which is the dominant one in the country. In particular though, the case study is focused on a certain Greek province, the one of Central Macedonia (Figure 4.1). The study area includes the prefectures of Thessaloniki, Pella, Imathia, Kilkis, Halkidiki, Pieria and Serres which together constitute the geographical area of Central Macedonia. The choice for this specific geographical periphery is justified upon certain criteria. Greece has a range of different wine regions like Crete, Peloponnese or the islands in the east Aegean such as Santorini. However, these regions have only lately emerged as a tourist attraction. The province of Northern Greece is where wine tourism was first developed, while the later still continues to be the most systematically organized one across the whole country (New Wines of Greece, 2013). Moreover, Central Macedonia is the birthplace of the first Wine Roads in Greece-the 'Wine Roads of Macedonia'-where they were outlined in 1993 by a non-profit organization, the 'Association of Wine Producers of the Macedonian Vineyard'¹⁴ (Karafolas, 2007). Almost a decade later, in 2002, wineries from the peripheries of Epirus and Thrace joined the association and the 'Wine Roads of Northern Greece' (Wine Roads of Northern Greece, 2013) were born, which is the biggest trademark relative to wine tourism in Greece. Furthermore, they consist the only Greek wine roads that were financed by two European projects; the first being the Organization of Cultural Capital of Thessalonica in 1997 and the other one was the LEADER 2 program which financed activities involving the agro-tourism development of the vineyard regions (Karafolas, 2007). Another reason, for choosing this certain study area is the fact that it comprises a plurality of grapevine areas with different characteristics in terms of morphology, the level of tourism development and urbanization and the distance from urban and tourist centers (Wine Roads of Northern Greece, 2013). In addition, some of the biggest wine producing firms (Papalexiou, 2009) are located in the region. Finally, Northern Greece-including Central Macedonia-allocates a valuable network of infrastructure and activities (New Wines of Greece, 2013).

¹⁴ The 'Wine Producers Association of the Macedonian Vineyard' has been renamed into the 'Wine Producers Association of the Northern Greece Vineyard' in 2002 when wineries in Epirus and Thrace joined the Association.

Figure 4.2: The study area



Source: www.travelinfo.gr (06.06.2013)

4.4 The test population

The test population of the study is diverse and consists of three groups. The first group is composed of eight (8) wineries that are members of the 'Wine Roads of Northern Macedonia'. Their perspective of wine tourism is the most valuable one since they are already involved in it and are capable of having an insightful view upon the subject. However, the author of the study considers that non-members wineries can also add value to the research since they constitute potential actors of wine tourism but their non

involvement renders them external observers of the phenomenon. Hence, the second group of the test population consists of three (3) wineries that are not members of the 'Wine Roads of Northern Greece' trademark. Furthermore, not only wine producers are involved in wine tourism. On the contrary, it concerns other actors too like local authorities, commercial groups, associations and other tourist service providers. Thus, the sample is completed with the third group of actors who either play an active role in wine tourism like the 'Wine Producers Association of the Northern Greece Vineyard', or a more supportive one like the General Tourism Office of Thessaloniki, the Municipality of Thermaikos and a restaurant. The 'Wine Roads of Northern Greece' lists 41 accessible wineries while 19 out of them are located within the periphery of Central Macedonia. From these 19 wineries, 8 are included in the sample. Finally, from the 27 dining venues included in the 'Wine Roads of Northern Greece', 12 are located within the study area and one is included in the sample. The restaurant included in the sample is also a member of the 'Wine Roads of Northern Greece' and is located in the Prefecture of Thessaloniki. The Table 4.1 below illustrates the composition of the sample concerning the first group of the interviewees whereas the Table 4.2 presents the composition of the whole sample. In the table (4.1) are included only¹⁵ the wineries that are member of the 'Wine Roads of Northern Greece' and located within the geographical boundaries of the Periphery of Central Macedonia.

¹⁵ The 'Wine Roads of Northern Greece' consists of 5 Peripheries in total, namely the Peripheries of East Macedonia and Thrace, Central Macedonia, West Macedonia, Epirus and Thessaly but only the periphery of Central Macedonia belongs to the study area.

Table 4.1: Sample distribution for the first group of the interviewees

Periphery	Prefecture	Number of wineries	Number of entrepreneurs	Number of interviewees
Central Macedonia	Pella	1	1	1
	Imathia	5	5	-
	Pieria	0	0	-
	Halkidiki ¹⁶	5	4 ¹⁷	4
	Thessaloniki	4	4	3
	Serres	0	0	-
	Kilkis	4	3 ¹⁸	-
Total	7	19	17	8

Table 4.2: Composition of the total sample of the interviewees

Category of the interviewees	Number of the interviewees
Wineries-members of the “WRONM”	8
Wineries-non members of the “WRONM”	3
Dining venues-members of the “WRONM”	1
Commercial compounds	1 ¹⁹
Municipal authorities	1 ²⁰
Tourism general offices	1 ²¹
Total:	15

¹⁶ Mount Athos is a self-governed part of the Greek state, located on the Athos peninsula of Halkidiki in Macedonia. It is the center of the Orthodox Christian monasticism with great national monuments of historical, religious, secretarial and cultural value on a global scale.

¹⁷ The company A owns 2 wineries in the study area, so the owner of the business is counted once in the winemakers of the Prefecture of Halkidiki.

¹⁸ The company B owns 2 wineries in the study area, the one on the Prefecture of Imathia and the other one in the Prefecture of Kilkis. However, the company’s headquarters are located in the the prefecture of Imathia, so the owner of the business is counted once in the winemakers of the Prefecture of Imathia.

¹⁹ The commercial compound is the ‘Wine Producers Association of the Northern Greece Vineyard’.

²⁰ The Municipal Authority is the Municipality of Thermaikos, located in the Prefecture of Thessaloniki.

²¹ The Tourism General Office is the General Tourism Office of Thessaloniki.

4.5 Design of the personal interviews

The primary data in order to serve the due case study were collected through the semi-constructed personal interviews method (Bruman and Bell, 2003). The interviewees were eleven (11) winemakers, one restaurant owner, the Representative of the 'Wine Producers Association of the Northern Greece Vineyard', the representative of the General Tourism Office of Thessaloniki and a Municipal Councilor of the Municipality of Thermaikos. The method of the qualitative interviewing was selected because it is orientated to the interviewee's own point of view and can provide rich and in-depth information (Bruman and Bell, 2003). Moreover, this method allows for flexibility since it provides the researcher with information upon what the individual considers "relevant and important" (Bruman and Bell, 2003:474).

The interview content for the first group of the sample revolved mainly through the following thematic sections: a) demographic characteristics of the wine tourists and their motivation, b) the supply side of wine tourism; questions about the services the winery offers to visitors, the benefits for the wine makers from entering the wine tourism business, their relationship with the other members of the 'Wine Roads of Northern Greece' and with the policymakers, c) advantages and disadvantages of wine tourism for the region where it is practiced; questions about the future prospects of wine tourism in Central Macedonia, negative experiences from tourists, any barriers inhibiting its development d) the 'Wine Roads of Northern Greece'; in this last section the interviewees were invited to respond to questions concerning their benefits or losses from their membership in the wine roads and their motives to enter the 'Wine Roads of Northern Greece'. Apparently, the interview questions were in consistency with the literature review and the study of the case studies. The questions addressed to the non-members of the Wine Roads were fewer in number than those addressed to the members of the Wine Roads but yielded equally insightful results. The questionnaire addressed to the second group of the sample was revolving around the reasons for their not membership, the role of the policymakers concerning information and awareness on wine tourism, the reason for offering even partially wine tourism services (in case they do offer them) and any perceived barriers for the wine tourism practice. Questions addressed to the third group of the sample were revolving around the same thematic axes as the questionnaire for the first group but with some diversifications. Moreover, the policy makers interviewed were requested to give information about their

role and extent of involvement in wine tourism and any policies adopted to accommodate it. It should be noted at this point that all the interviews were transcribed from the recordings (Bruman and Bell, 2003).

Supplementary, the method of participant observation was used in which the researcher is herself part of the study environment. The aforementioned technique is a key tool of field research and permits investigation of social behaviors and procedures in their natural environment as well as collection of detailed information (Bruman and Bell, 2003). As far as the participant observation is concerned for the due study, the approach of Carlsen (2011)²² was adopted, which provides for the involvement of the researcher in the wine tourism experience in the capacity of a wine tourist. In particular, the author visited some wineries and experienced the services provided to wine tourists; she also visited a wine museum while she attended an annual event concerning the Greek wine²³.

4.6 Research limitations

The wineries responded to the qualitative interviewing are not well spread across the seven prefectures of the Periphery of Central Macedonia. They are concentrated across the three out of the seven Prefectures. This may not enhance the representativeness of the sample. Furthermore, the study is limited to one region of Greece. It is probable that attitude towards wine tourism might vary across regions (Charters and Menival, 2011). However, the outcome of the responses is still insightful and rich in information.

²² Carlsen (2011) used the technique of the participant behavior in order to assess the level of the service quality in wineries.

²³ The annual event is the 'Open Doors 2013' which is held every year in May at the wineries-members of the 'Wine Roads of Northern Greece' (Wines of North Greece, 2013).

4.7 Conclusion

The present work constitutes a case study focused on a certain region in the country of Greece, that of the Periphery of Central Macedonia. This study area was selected for reasons of historical, geomorphologic and practical significance. The method used to collect the data is the qualitative interviewing under the form of constructed personal interviews. Since the aim of the due study is to examine how wine tourism can contribute to financial development of the rural areas from the supply side view, the interviewees were local authorities, professional compounds, a restaurant owner and of course, winemakers. The later are both members of the 'Wine Roads of Northern Greece' and non-members, in order to obtain a more detailed and comprehensive view on the topic. The information collected from the interviews constitutes the primary data of the study, whereas the secondary data were collected from an extensive literature review that preceded the qualitative research method. Finally, the results of the method are presented and discussed in chapter 5 which concerns the case of Central Macedonia.

5: Case study: the case of Central Macedonia

5.1 Introduction

Viniculture and wine production in Greece is inextricably linked with the country's history and tradition since its ancient past. Homer's epics testify the existence of winemaking from the 800 B.C. In fact, the first wine legislative text dates back to 420-400 B.C. Ever since, the wine trade was rising, the worship of Dionysus spread across the ancient Hellenic world while wine was the central theme of symposia and festive events (Boutaris, 2008). Despite a decline in viniculture during the roman rule; it flourishes again by the 5th century A.C during the Byzantine period, especially in the province of Macedonia. At the time, viticulture was mostly carried out by the monks in the monasteries of Mount Athos. Many of these monasteries were visited by the emperors of the Byzantine Empire (Boutaris, 2008), fact which reveals initial seeds of wine tourism in Greece.

However, at the following years of the Ottoman Domination, heavy taxation prevented Greece for developing its wine sector (Hall and Mitchell, 2000). Only by the Greek Independence did the wine sector in the country encounter a systematization in production when the first large-size wine producing companies set up (Boutaris, 2008; Hall et al., 2000). Two other critical points in the development of the Greek wine industry are the revision of the wine legislation within the context of the country's entrance in the EU, which initiated a new era for the Greek wine and the approval of the term "regional wine" in 1969 and 1988 respectively (Boutaris, 2008). Since then, the Greek wine industry followed a progressive growth whereas international awareness of the Greek bottled wines continuously increases.

Hence, the following section concerns the wine tourism development in Greece in general while section 5.3 focuses on the province of Central Macedonia and the 'Wine Roads of Northern Greece'. Moreover, the supply side of wine tourism, the marketing efforts, the advantages and disadvantages of wine tourism and the future prospects for Central Macedonia are also examined in the next sections.

5.2 Wine tourism in general

Vineyards and wineries²⁴ in Greece can be found all over the country. In particular though, the largest part of the semi-mountainous and insular parts of Greece is covered by vineyards. At the same time, the majority of the country's archeological sites and natural sceneries are surrounded by vineyards (Velissariou et al., 2009 in Pitoska, 2012) providing a good starting point in developing wine tourism. Furthermore, the first VQPRD²⁵ wines in history were produced in Greece while the implementation of appellation regulations in consistency with the EU standards favored the resurgence of ancient traditions in wine production in the country. All the above favored wine tourism development and incorporated local wines and cuisine in the general tourism offering of the country (Hall et al., 2000). The later was achieved through the promotion of cruise packages and wine tourism websites, the establishment of wine routes and the promotion of local wines at international resorts (Hall et al., 2000).

However, despite the long wine culture of the country, the existence of unique native varieties (Alebaki and Iakovidou, 2010b) and a plethora of wineries and vineyard sites, only recently (early '90s) did wine tourism develop in a systematic way (Velissariou et al., 2009). One of the reasons contributing to this delay is the geographic disperse of the wineries and wine regions. In contrast with other wine regions like Burgundy and Napa Valley, where wine production is concentrated in certain rural spaces, Greek wineries are spread across the country setting a distance matter (Wright, 1996 in Hall and Mitchell, 2000; Hall et al., 2000).

Nevertheless, there are some signs of wine tourism development recorded in the country before the 1990. There are some individual wineries in the wine regions of Peloponnesus and Samos that received large flows of visitors due to their particular architecture or long history in the business (Velissariou et al., 2009). Moreover, there are also some examples of accessible wineries in various Greek islands like Rhodes, Santorin and Crete. These visits to the wineries are part of package holidays revolving mainly around the three "S" (Sea, Sun, Sand), (Alebaki and Iakovidou, 2010b).

By the early 1990s though, there has been recorded an increase in the number of wineries. At the same time, new varieties are being introduced by oenologists possessed by a

²⁴ The total number of the wineries in Greece is 682 (Wine Surveyor, 2013).

²⁵ Vin de Qualité Produit dans une Région Déterminée

pioneering philosophy whereas a spirit of noble rivalry is being cultivated among the operators of the sector. During the following years, significant investments are being realized aimed at improving the infrastructure. These are also accompanied by the first coordinated efforts to develop wine tourism (Pitoska, 2008).

These efforts begin in the 1990s where rural tourism has emerged as an alternative form of tourism in the country, and wine tourism is one aspect of it. Hence, an official wine tourism framework was established in 1993 in the province of Macedonia by a private initiative. However, today there are several wine regions practicing it throughout the country. The most important of them are Peloponnesus, Macedonia, Attica and the islands of Crete, Rhodes, Santorin and Samos (Hall et al., 2000). Accordingly, associations of wine producers were established in the majority of the Greek wine areas (Peloponnesus, Central Greece, Crete, and Aegean islands) while there are also wine routes set up in Peloponnesus and Crete (Alebaki and Iakovidou, 2010b). Nevertheless, wine tourism in Greece is considered to be at a relatively initial stage aiming though to develop much further in accordance with the international standards.

Rural tourism and wine tourism accordingly was a response to mass tourism directed mostly towards the islands and to the economic discrepancy of rural regions, often excluded from tourism, as well (Karafolas, 2007). Wine tourism is a form of rural tourism developed in Greece to promote those regions and to promote also wine firms. With regards to the later, wine tourism is also an instrument for valorizing the PDO²⁶ wine regions (Gatti and Incerti, 1997 in Vlachvei and Notta, 2009) and increasing wine consumption. In fact, although wine satisfaction in the country has risen, wine consumption has been decreased. This is explained by the fact that the Greek wine sector is facing a fierce competition from other alcoholic beverages. Thus, wine consumption has been reduced resulting in excessive wine supplies (Polos, 1993a in Tzimitra-Kalogianni et al., 1999). Moreover, since the implementation of EU's eradication policy (see section 3.2), viticulture in the country has been decreased (Papalexiou, 2009). Thus, wine tourism and wine routes in particular is one of the most dynamic tools for increasing wine consumption and acquainting consumers with local wines (Tzimitra-Kalogianni et al., 1999).

²⁶ The Protected Designation of Origin (PDO) and the Protected Geographical Indication (PGI) are two of the quality marks of wine production recognized by the EU. These verify the "use of certain production methods and raw materials from a particular geographic area". The Hellenic Ministry of Agriculture Development and Food has recorded 20 PDO and 8 PDI wines (Vlachvei and Notta, 2009).

Consequently, the implication of Greece in wine tourism lies in a twofold aim: to increase the income of the wine industry and overcome current difficulties in production and international rivalry and to promote and develop rural regions by putting them on the world tourism destination map. Therefore, given these circumstances shaping the Greek reality around the wine sector and the depressed countryside, Greece and specifically in the light of a certain province (Central Macedonia), constitutes an exemplary case to assess the effectiveness of wine tourism in rural development.

5.3 The Central Macedonia wine region/ the ‘Wine Roads of Northern Greece’

Central Macedonia is located in the far north of Greece. Due to its climatic and soil conditions, the climate of the area is excellent for viticulture with many hours of sunshine and abundant rainfall. Central Macedonia is one of the 13 geographical districts of Greece and one of the Peripheries of Macedonia. It consists of the prefectures of Halkidiki, Imathia, Kilkis, Pella, Pieria, Serres and Thessaloniki. The wine tradition in Macedonia has its roots in ancient times. Many historical cities such as Pella, Sindos and Pydna, were famous for their exquisite wines. The archaeological findings such as the Macedonian crater (340 BC), which inspired the design of the bottle of wine, witness the long wine tradition of the area (Tsantali, 2013).

In addition, it has a large number of wineries that attract a large number of visitors annually. Most of the wineries located there have joined the program ‘Wine Roads of Northern Greece’. Furthermore, the wider area of Central Macedonia is mainly renowned for its red wine produced by the Xynomavro grape (Hall et al., 2000) and its white wine produced by the Malagouzia grape. The later grape variety is of particular significance for the region since it was about to vanish before respondent E revive its plantation.

In such a vast area, the potential for tourism today is very large, covering all seasons and all aspirations and expectations. Wine tourism in Northern Greece is also greatly facilitated by the Egnatia Highway, which intersects Northern Greece from end to end, offering fast and

secure transfers (New Wines of Greece, 2013). However, wine tourism in Central Macedonia has its roots in a pioneer initiative of the wine producers of Northern Greece back in 1993.

By that year, 15 visionary winemakers set up a non-profit and non-stock corporation by the name 'Wine Producers Association of the Macedonian Vineyard' under the trade name 'Wine Roads of Macedonia'. Their goal was to create the conditions for support the viticulture tradition and allow to Greeks and foreigners to discover the Macedonian vineyard. In 2002 though, the Association was renamed into 'Wine Producers Association of the Northern Greece Vineyard' under the trade name 'Wine Roads of Northern Greece' due to its geographic expansion to the provinces of Thrace, Thessaly and Epirus (Karafolas, 2007). The network was also supplemented by Associate Members like restaurants, guesthouses, alternative tourism businesses, liquor stores, wine counseling companies in order to jointly promote products and services and create the conditions to support wine tourism activities and the northern Greek cuisine. Lastly, in 2010, the 38 winemakers decided to rename the Association into 'Wines of North Greece'.

Today, the Association consists of 37 members while the 'Wine Roads of Northern Greece' continue to play a leading role in support of wine, a key element in the Greek cultural identity and offering visitors to the Northern Greek vineyard a total of 8 different routes, leading from Mount Olympus, home of the gods, and Zitsa in Epirus to Byzantine Thessaloniki and from Amyntaio in the north to the Aegean playground of Halkidiki, the Dionysiac heartland of Mount Pangaio and delightful, distant Thrace (Wine Roads of Northern Greece, 2013). In particular, the wine routes concerning the province of Central Macedonia are:

- The Wine Route of Pella-Goumenissa
- The Wine Route of the Olympian Gods
- The Wine Route of Naoussa
- The Wine Route of Thessaloniki
- The Wine Route of Halkidiki

These routes constitute a proposal for the modern traveler to follow a predetermined, selected route, which crosses the most picturesque points of a wine region. Moreover, one has the opportunity to visit selected winery units that conform to certain standards and guarantee high levels of hospitality. Parallel to that, they offer the potential of enjoying sites of archaeological, folklore, environmental or cultural interest as they were designed in such

a way that each one of them represents different wine varieties and particular cultural and historical sites (Wine Roads of Northern Greece, 2013; Karafolas, 2007).

Finally, the wine roads program was financed through the exploitation of two venues, during the five-year period of 1996-2001:

1. The Thessaloniki Cultural Capital of Europe. In 1997, Thessaloniki was the Cultural Capital of Europe. Thus, the Association received a fund of € 528.247 within the framework of the 'Wine Roads-Gastronomy' program by the Organization of Cultural Capital of Thessaloniki. The largest part of the funding was used by the Association to cover its operations costs and promotion costs of the Thessaloniki Cultural Capital of Europe. At the same time, 8 wine routes crossing the northern part of the country were designed.
2. The EU's LEADER 2²⁷ program which was approved in 1996 by the then Ministry of Agriculture with a final budget of € 3.587.702. The LEADER 2 program was the main financial source of the 'Wine Roads of Northern Greece' concerning the following support measures: technical support, professional training, reinforcement of agro tourism, exploitation of agricultural production, preservation of the cultural heritage and international cooperation.

Nevertheless, these funds and the LEADER 2 in particular, were not a determinant for the wine producers to enter the wine tourism field since the majority of them, 7 out of 8, were co-founding members of the Association. Thus, the funding was a great support for their operations but their main motive was their wine love. To cite a quote of respondent D «the establishment of the Association was the outcome of a change in the mentality of winemakers; a new generation of winemakers, highly educated and visionary, inspired this concept (the 'Wine Roads of Northern Greece') in order to initiate people into the world of wine and to alter the general international overview that Greek wines are of lower quality». Even for the respondents B, who is not a co-founding member, the LEADER 2 program was not a motive. Rather, the enthusiasm about wine motivated his involvement. In addition, the 3 winemakers that are non-members of the Association, although they share the same passion for wine, would not implicate in wine tourism within the LEADER 2 program (2 out

²⁷ The Liaisons Entre Actions de Développement de l' Economie Rurale program concerns the financing of activities of soft agricultural and tourist development of wine regions. The main beneficiaries of the program are local in character like local authorities, unions, municipal enterprises and agricultural corporations (Karafolas, 2007).

of 3). As they argue, it requires the use of own capital, has a lot of criteria and requirements that do not facilitate their involvement.

Consequently, wine tourism in Central Macedonia is the most organized one in Greece emanating from a pioneer initiative of a few visionary wine producers. The distinctive features of the region seem to favor wine tourism development; however, acquiring new members to the Association offering such services is difficult given the costly investments it requires. In fact, the size of the wine tourism flows does not favor further investments while nearly a quarter of the interviewees would not recommend winemakers to enter wine tourism given the country's economic downturn. The latter renders wine tourism in Greece a rather stagnant business.

5.3.1 The wine tourist

As Alebaki and Iakovidou (2010b) support, there are no official statistical data concerning the characteristics of the wine tourism at a national level. The same applies for the region of Central Macedonia and the 'Wine Roads of Northern Greece' in particular, as claimed by the representative of the 'Wine Producers Association of the Northern Greece Vineyard'. There are though certain studies that reveal the composition of the market. Hence, wine tourism in the country's mainland attracts more domestic visitors (70% of the total visitors) while the same phenomenon in the islands applies more to international tourists. The islands of Rhodes and Santorin in particular, as popular tourism destinations, receive the majority of international wine tourists followed by Peloponnesus (Alebaki and Iakovidou, 2010b). Moreover, two distinct studies of Alebaki and Iakovidou (2010a; 2006 in 2010b) concerning the demographic and psychographic characteristics of wine tourists of the 'Wine Roads of Northern Greece' classify them in 4 categories: the 'wine lovers', the 'neophytes', the 'occasional wine tourists' and the 'hangers-on' (see section 2.3.2 for details).

However, the personal interviews with the winemakers (both members and non-members) indicate that they recognize only two classifications of wine tourists. The first type is the 'wine interested' whose main motives are to be acquainted with the producer, see the production space and learn about the viticulture tradition and the production procedure. The other category is the 'occasional wine tourists'. These have a relative interest for the

wine and the winemaking and aspire to become wine lovers but their visit is mostly part of a broader tourism package or an occasional stop at the winery while crossing by. According to a general overview (7 out of 11), the latter category is the most common one.

With regards to their demographic features, these are mainly male domestic visitors and their age ranges between 40-60 years (8 out of 11). Only two winemakers receive mostly foreign visitors usually coming from Russia and Germany in the context of package tours (respondents A and G). The visitors of respondents B and H demonstrate a particular trend since they are strongly related with religious tourism. The former's winery is located in the mountainous part of the Halkidiki which is a passage to Mount Athos, the center of the Orthodox Christian monasticism. Thus its visitors are mostly men and their origin is almost equally balanced between domestic and international visitors. In addition, the winery of respondent G is located at Mount Athos, so its accessibility is limited only to male visitors, mostly Greek but with a strong presence of Russian ones while visitation to it is only upon specific agreement.

Hence, the wine tourists of Central Macedonia are usually occasional tourists of male gender who have the prospect however to become wine lovers. Moreover, they are mainly Greek visitors but there is a significant presence of international visitors directed mostly to the wineries located in the Prefecture of Halkidiki. Thus, the motives of international visitors are usually combined with holidays or religious tourism in Halkidiki which is one of the most famous tourism destinations incorporating the three "S" and one of the most visited religious destinations in the country. Consequently, these two features of the region are a strong element to build upon wine tourism development.

5.4 Supply side of wine tourism

The supply side of wine tourism in Greece is in general in accordance with the respective one in the countries of France, Italy and Australia. It consists then from actors coming both from the wine and tourism sector, State's actors and the rural landscape. These are namely the wineries, vineyards, the accommodation and dining industry, offices for alternative activities, consulting services and the beverage industry (Pitoska, 2012; Karafolas, 2007). However, the degree of involvement for each part of the supply differs among the countries.

With regards to Central Macedonia, the responses of the personal interviews were very insightful in shaping the supply side in more detail.

To begin with, all of the respondents argued that the rural scenery, which is unique from region to region, and the wineries and vineyards are the primary players of the wine tourism. In fact, the country's wine industry is largely fragmented consisting of a large amount of firms, varying in size and contribution to the industry. There is a small number of large and well-organized wineries while the majority of the wine firms are small/medium sized ones (Vlachvei and Notta, 2009). From this large amount of firms, the ones implicated in wine tourism by being members of the wine routes, offer tours in the areas of winemaking, bottling and maturing of wines in the cellars and in the vineyards as well, wine tasting opportunities in specially designed halls, projection rooms and wine cellars. The aforementioned services are provided by all the respondents while one of them (respondent A) owns also a wine shop selling, souvenirs, wine books and other wine-related products, while two of them (respondents A and D) offer dining services as well. Moreover, respondent E, maintains on its premises a unique wine museum exhibiting tools of viticulture, winemaking, bottling and cooperage from all over the world whereas some of them date back to 1976. Of particular significance is the collection of openers from all over the world which lists more than 2000 items.

Relationships among these actors are of particular importance and are governed by a spirit of cooperation and noble competition. Citing a quote of respondent G is more than exemplifying of this spirit: «there is no competition among us (the wine producers). We have a common goal, so there is no need in competing with each other. Our primary goal is to make worldwide known that Greece produces high quality wines. We want to attract visitors firstly in Greece's rural regions. After that, it is on everyone's discretion to differentiate and gain visitors and potential wine consumers». Hence, within this framework of cooperation, it follows naturally that the membership in the 'Wine Producers Association of the Northern Greece Vineyard' has more than improved relationships among winemakers.

In addition, there are also wine producers offering some of the aforementioned wine tourism services even if they are not members of the 'Wine Roads of Northern Greece'. In fact, all of the interviewees-non-members of the Wine Roads offer services like wine tasting and tours in the winemaking and bottling halls due to their lust to promote local wines and educate consumers. However, only one of them considers that wine tourism is relevant to its core business activity (respondent J).

Furthermore, in the supply of wine tourism are also included various tourism and other service providers like hotels, guesthouses, restaurants, shops with traditional products, archeological sites and premises for alternative activities (Wine Roads of Northern Greece, 2013). Today, the 'Wine Producers Association of the Northern Greece Vineyard' under the official name 'Wine Roads of Northern Greece' lists 37 members and 8 wine routes suggesting visitation to 41 accessible wineries. In the Table 5.1 it is illustrated the composition of the cooperative members of the Association.

Table 5.1: Composition of the Cooperative members of the 'Wine Roads of Northern Greece'

Type of cooperative members	In the entire 'Wine Roads of Northern Greece'	Only in Central Macedonia
Accommodation	24	8
Restaurants-cafes	38	22
Local products	14	5
Outdoor activities	1	1
Total	77	36

According to the testimonies of the winemakers (both members and non-members) the cooperation between the winemakers and those service providers is very effective and well coordinated in order to provide visitors a unique wine tourism offering. However, 9 out of the 11 winemaker's interviewees argued that hotel and restaurant owners that are not members of the Association are reluctant in cooperating with them and promoting local wines. The general overview mostly for the restaurant owners is that they are trapped in offering a standardized cuisine and popular drinks in order not to lose their tourist clientele.

Moving on, the most important actor of the wine tourism supply in the country and in Central Macedonia in particular, is the 'Wine Producers Association of the Northern Greece Vineyard'. After all, the wine tourism development in its current form begins from Northern Greece and the collective action initiatives of the Association (Pitoska, 2012; Hall et al., 2000). The vision of the Association is to support the vine-growing and wine-producing tradition and offer to Greek and foreign visitors the opportunity to explore the hospitality of

the vineyards of Northern Greece. At the time, its main objectives are to build the image of the local wines and promote them worldwide, provide visitors with an all-round wine tourism proposal, support the cultural heritage of the country and shape the rules governing the relationships among grape-growers, winemakers and wine merchants aiming to optimize their cooperation and improve products and services offered to consumers (Wine Roads of Northern Greece, 2013). The active role of the Association is acknowledged by all the interviewees, both winemakers and competent bodies.

As far as the role of municipal authorities and the government is concerned, it is not as supportive as expected. The vast majority of the winemakers (8 out of 11) and the representative of the Association claimed that the role of the local authorities and the government in consequence is of little or non-existent. According to respondents E and G (both members of the 'Wine Roads of Northern Greece') the role of the municipality is limited in moral support of private initiatives and communicating wine tourism and wine events within the borders of their municipality. In addition, these two acknowledge that most of the support, either financial or promotional, is being done in the context of the European Union programs. Moreover, respondent K who is not a member of the wine roads recognizes a significant support from the Agriculture Directorate. However, bureaucracy hinders municipal or governmental support (respondent I). The interview with the municipal councilor of Municipality of Thermaikos verifies the aforementioned. As he claims, there is no governmental guidance to support wine tourism while there are no longer funds available to enhance private initiatives; mainly due to the recent financial crisis. Nevertheless, they do acknowledge the benefits of wine tourism for the participating regions.

Finally, the role of tourism bodies and institutions is similar to that of municipalities. There is rarely cooperation with wineries to bring tourists to their premises or organize particular wine tours. Only two of the 8 wineries-members of the wine roads claimed cooperation between them and tourism operators (respondents A and G). The former owns one of the biggest hotel units in the country and for this reason cooperation with travel agencies is more plausible. The latter on the other hand is one of the biggest wine companies in Greece and testimonies that tour operators visit their premises in order to assess the wine tourism services offered and design wine tourism packages, mostly to foreign visitors. For example, travel agencies organize visitations to wineries for Russian and German tourists within the context of package tours (respondents A and G).

However, the discussion with the representative of the General Tourism Office of Thessaloniki revealed the absence of exclusive wine tourism programs running currently by the Hellenic Ministry of Tourism or the Greek National Tourism Organization and the weakness in informing tourists on wine tourism sites and routes in the country. There are though two current development projects concerning alternative tourism and agro-tourism issued by the Hellenic Ministry of Tourism and the Hellenic Ministry of Agriculture Development and Food respectively, where wine tourism is just a part of them. These programs are co-financed by the Rural Development Programme of Greece and the Leader programs (Hellenic Ministry of Agriculture Development and Food, 2013).

Consequently, the supply side of wine tourism in Central Macedonia and in Greece in general is mainly composed to a primary level by the 'Wine Producers Association of the Northern Greece Vineyard', wineries and vineyards, accommodation and dining service providers and cooperatives of local products. At a secondary level, tourism bodies have only recently started to realize the potential of wine tourism and thus are involved in development efforts. Municipal authorities and the government are the less involved actors displaying a rather supporting role to private initiative and projects. According to the conclusions derived from the case studies in chapter 3, the latter is rather an inhibitor in wine tourism development, but it remains to be seen in more detail in the next sections.

5.5 Marketing projects of wine tourism

The development of cruise packages, the existence of wine tourism websites and the promotion of Greek wines at international hotel chains are common marketing tools at a country level. When focusing at a regional level, the largest part of wine tourism marketing is carried out by the 'Wine Producers Association of the Northern Greece Vineyard'. Thus, some of the tools employed in promoting wine tourism in Central Macedonia by the Association are the following: indicating and signposting wine tourism trails through the Vineyards of Northern Greece so as to make people aware of all the points of oenological, cultural and tourist interest, educating staff in the wine and the tourism industry to be able to make qualitative proposals to consumers and to flaunt the distinctive features of the grape-growing regions, reinforcing a new type of tourism cooperation by participating in

international societies and organizations with related themes, taking initiatives to organize gastronomic and cultural events and/or conferences and taking part in international trade fairs either in Greece or abroad (Wine Roads of Northern Greece, 2013).

Moreover, the biggest events in terms of popularity and turnout of the crowd according to the representative of the Association are the “Open Doors”, the “VorOina” and an annual International Wine Competition, which is unique in the country and aims to promote the international quality wine production both to industry professionals and to the public. The “Open Doors” event is the equivalent of the “Cantine Aperte” organized in Italy. It is organized in the last weekend of May during which the wineries open their doors to the public free of charge. The concept is that wineries are accessible to visitors and present various wine-related activities since each winery hosts different events. “VorOina” may be the most popular event and concerns a wine tasting of the Association’s producers’ newest wines. It is organized annually in Athens, Thessaloniki and other Greek cities to make people aware of the Association and the wines produced in Northern Greece.

Apart from these entrenched wine events, some of the wine producers design their own marketing campaigns. The firm of respondent G for example, cooperates with wine bloggers and wine journalists to promote the firm’s wines and increase awareness of the wine tourism services offered at the company’s facilities. Respondent E on the other hand, apart from the wine museum which is an attraction by itself, has organized the “Bring your own wine” action in partnership with the region’s restaurants. Within this action, customers could bring their own wine at the restaurants they were dining. The specialized personnel ought to make the right combination of food and wine in order to excel the visitor’s gastronomic experience. Moreover, the same interviewee publishes a series of cookbooks that include only local recipes suitable for wines produced in the region. Thus, the aim is twofold; increase post-visit wine consumption and induce re-visits to the region to discover more of its features. Finally, respondent D appears on cooking TV shows to promote the cuisine and the drinks of Central Macedonia.

Furthermore, noteworthy is also the response of respondent F concerning the marketing efforts for wine tourism. He underlines the increased significance of the new social media in terms of promotion and increasing awareness for the wine regions and the wineries themselves. «The future of marketing belongs to the social media and every winery should be in position to exploit them for their own sake». Consequently, his estimation predicts a more individualistic future role of marketing.

Apparently, there are some significant marketing projects run both by the Association and the wine producers themselves. However, the communication activities of the Association aim at promoting wine products and wine tourism at international markets while the individual marketing efforts are more introspective. They target to increase awareness within the domestic market and usually they are oriented in promoting distinctive culinary features of their region. Anyhow though, gastronomy is one of the experiences sought while travelling and wine tourism is directly related to gastronomy.

5.6 Advantages and disadvantages of wine tourism

Studies carried out in Greece so far, confirm a positive impact of wine tourism both for the wine industry and the local economy (Karafolas, 2007; Pitoska, 2012; Vlachvei and Notta, 2009). The former stresses the contribution of wine tourism in company growth and enhancement of relations among the actors of the supply side, while it values regional promotion as the most significant impact in terms of rural development. According to the later scholars, wine tourism in the country has indeed benefited the wine firms but also the rural areas where it is practiced. In particular, improvement of the destination image and diversification of the local economy based on its natural resources are the most significant impacts of the phenomenon. Other positive effects of wine tourism are the leverage of investments and the rise in entrepreneurship and employment. However, although positive, these are rather moderate impacts (Pitoska, 2012).

The interviewees' point of view concerning the advantages and disadvantages of wine tourism in Central Macedonia are to a significant extent consistent with the existing literature. For the wine producers-members of the Wine Roads, the improvement of the brand image and increase of awareness about the local bottled wines are by consensus (8 out of 8) the most significant effects of wine tourism. Second most important impact for the wine industry is the increase of export sales and cellar door sales. With regards to the former, 2 of the respondents underline the importance of wine tourism for the Greek wines in new markets (respondents A and G). To be more precise, respondent G claims that: «wine tourism in combination with some governmental funds to promote Greek wine in third countries has resulted in the opening up of new markets like India and China. Since the

European market is already contested, the establishment of a multinational image for the Greek wines is among the most important effects of wine tourism». In addition, those who do not claim any considerable impact on cellar door sales, acknowledge the fact that this is the case because the largest part of their sales is made through distribution centers. Also unanimously, the winemakers-members of the Association argue that wine tourism has improved their relationships and strengthened their cooperative spirit for achieving a common goal. Finally, none of them considers any significant disadvantage from practicing wine tourism nor they have experienced any unpleasant situation.

The aforementioned benefits for the wineries are also supported by the representative of the 'Wine Producers Association of the Northern Greece Vineyard'. Although he stresses the lack of data to assess the exact impact of wine tourism, his estimation upon the benefits of wine tourism is in line with that of the winemakers. On the other hand, the wine producers-non-members, although they are partially involved in this practice by offering some wine tourism services, are more moderate on their evaluation. For the majority (2 out of 3), the only contribution of wine tourism for their firm is the increase in the cellar door sales. However, respondent J recognizes also the increase in awareness and enhancement of his brand. The restaurant owner finally, has been benefited in terms of increased clientele and increased awareness for his facility. However, he claims that the impacts although positive are rather moderate.

Moving on, wine tourism is also beneficial in terms of regional development. The most important advantages for the region are the improvement of Central Macedonia's image relative to the area's distinctive features and increased visitation which has also spread the tourist season (12 out of 15). In terms of local employment the results are positive (5 out of 8). However, the fact that the positive responses were all from the biggest firms may indicate that wine tourism in Central Macedonia is still of smaller scale to induce small firms to hire additional personnel. The later is further supported by the restaurant owner who recruits temporary personnel in times of wine tourism events. In addition, the majority of the respondents along with the municipal councilor claim that wine tourism is indeed beneficial for the region long-term. Yet, it is remarkable that although the municipality of Thermaikos and the Tourism General Office of Thessaloniki recognize the advantages of wine tourism, they are less implicated in it.

Consequently, wine tourism in central Macedonia and in Greece in general is beneficial for the enhancement of the viniculture income and rural development as well, whereas there

are no reports for disadvantages. Its greatest effects concern the increased awareness and improvement of the brand image both for the Greek bottled wines and the destination. However, the impact of wine tourism in the wine industry is readily apparent while its contribution to local growth becomes evident over time. Finally, it seems that its positive effect on the wine sector is greater than this on local economy probably because wine tourism in Greece is still on its infancy.

5.7 Future prospects of wine tourism

Although wine tourism in Greece is still at an initial stage, its systematic organization in different wine regions across the country, following the example of Central Macedonia, reveals some promising prospects perceived by its actors. For instance the design of a second wine route in the western part of Crete including 11 wineries is a concrete example of wine tourism development due to its success track so far (Alebaki & Iakovidou, 2010b).

The same applies for Central Macedonia as well. With overwhelming unanimity, all interviewees forecast many development prospects for wine tourism in the region. The first distinctive feature of the area justifying these prospects is the multi-variety of the microclimates in the region (15 out of 15). Second in ranking (4 out of 15) comes the existence of particular and sometimes unique wine varieties like Xynomavro which can arouse the international interest if well promoted. However, as respondent J characteristically claims: «the whole Greece is a vineyard. It is a blessed land. [...] only the wine though is not enough, there needs to be a further proposal to support it (wine tourism) ». Apparently, this quote, which also expresses one quarter of the respondents, underlines the key element of wine tourism development: its conjunction with the provision of other activities. According to the representative of the 'Wine Producers Association of the Northern Greece Vineyard' the wine alone cannot yet stand alone to attract international visitors. Rather, it needs to be first developed in the framework of general tourism, so as tourists have more options to combine it with.

Therefore, Central Macedonia is offered for wine tourism development due to the variety of its distinctive features. The local cuisine of the region can be a good starting point to develop wine tourism since gastronomy is of great importance for the tourists. Moreover, the

harmonious coexistence of contradictory landscapes (mountain and beach resorts) can induce wine tourism throughout the year. Another characteristic feature of the regions is the existence of various archeological sites, natural landscapes of extreme beauty, various churches and monasteries of different era and architecture, hydrobiotopes, and of course a plethora of beaches. Another remarkable feature of Central Macedonia is the location of Mount Athos. The later, apart from being the cradle of the orthodox monasticism demonstrates also a remarkable wine production. Even more, many of the wineries there are accessible to visitors²⁸. Thus, combining wine with religious tourism leaves promising prospects for wine tourism development. After all, visiting Mount Athos is one of the motives of the respondents' A, B and H occasional wine tourists, since their wineries are located near it.

Lastly, current international developments are also capable of enhancing wine tourism development if well exploited by the competent authorities. First, there is a growing tourist flow coming from Russia and Turkey while there is an international growing interest for agro-tourism. Wine tourism is part of the later whereas the first could be exploited in terms of package tours whose part is visitation to wine regions. Of particular importance is the recent growing demand for hiking tourism mostly in Germany (respondent E; representative of the 'Wine Producers Association of the Northern Greece Vineyard'). Thus, it is plausible to combine wine tourism with the hiking one by designing hiking routes crossing vineyards and wineries.

Consequently, the effect of wine tourism for Central Macedonia may be positive but rather moderate; however, the region itself provides all the right ingredients to develop wine tourism further. These lie in the particularities and natural resources of the region and on current tourism trends. Apparently, the raw material for wine tourism development is in abundance. It lies then in the proper valorization and promotion of the region's distinctive features to seize these opportunities and realize the promising prospects of wine tourism.

²⁸ Only men are allowed to enter the Mount Athos.

5.8 Conclusion

In this chapter a brief overview of wine tourism development in Greece has been presented with a detailed focus on the province of Central Macedonia. Although viticulture in Greece is inextricably linked with the country's culture since antiquity, wine tourism has only recently been developed. By the beginning of the 1990s a pioneer initiative by the 'Wine Producers Association of the Northern Greece Vineyard' has laid the foundations for systematic wine tourism development in the wine region of Central Macedonia by establishing the 'Wine Roads of Northern Greece'.

Thus, after a thorough investigation of the Central Macedonia case, the following conclusions can be derived. The wine tourists of Central Macedonia are usually occasional tourists of male gender who have the prospect however to become wine lovers. They are mainly domestic visitors but there is a significant presence of international visitors directed mostly to wineries located to regions incorporating the three "S" (Sea, Sun and Sand). Moreover, the primary factors composing the supply of wine tourism are the 'Wine Producers Association of the Northern Greece Vineyard', wineries and vineyards, accommodation and dining service providers and cooperatives of local products. Tourism bodies, the government and municipal authorities are still involved as secondary factors mainly supporting private initiatives. Moving on, the marketing campaigns run at two levels: firstly at a collective level through the 'Wine Producers Association of the Northern Greece Vineyard' and then at an individual level run by each entrepreneur separately. The former aims at promoting wine products and wine tourism at international markets while the latter are more introspective, targeting the domestic market.

Furthermore, wine tourism in central Macedonia is beneficial both for the enhancement of the viticulture income and rural development. However, the impact of wine tourism in the wine industry is greater than it is in the local economy. Yet, its contribution effect to rural areas is long-term and thus more sustainable. Finally, this type of tourism in Central Macedonia and consequently in Greece cannot yet stand alone as a single tourism offering. Thus, further wine tourism development lies in its combination with the exploitable particularities and natural resources of the region and on current tourism trends.

Consequently, as a general conclusion for the case of Central Macedonia, it can be said that wine tourism initiated as a means of rural restructuring and economic enhancement of the viticultural income and it has achieved its initial goal to a certain extent. Wine tourism's success

so far is ought to a variety of factors (see Table 5.2) with the long tradition in the wine industry, the country's popularity as a world tourism summer destination, the cooperative spirit of winemakers and the active role of the 'Wine Producers Association of the Northern Greece Vineyard' being the most important among them. However, there is a considerable amount of factors as well, inhibiting its growth (see Table 5.2). The most important ones are the cumbersome role of the government and municipal authorities, the poor wine tourism marketing, the lack of coordinated actions among the suppliers of wine tourism and the absence of its institutionalization. Hence, future prospects of wine tourism in Central Macedonia and in Greece as a consequence, are enormous. It lies though in the power of the competent authorities to overcome those barriers and utilize the existing valuable wine tourism material.

Table 5.2: Success factors and barriers of wine tourism in Central Macedonia

Success factors	<ul style="list-style-type: none"> ↑ Popular world tourism summer destination ↑ Long tradition in the wine industry ↑ Particular and unique wine varieties ↑ A vast pool of wine regions ↑ Cooperative spirit among the winemakers ↑ Resurgence of ancient traditions in the wine production ↑ A multi-variety of microclimates ↑ A unique and contradictory rural landscape ↑ A plethora of archeological sites and other sites of cultural interest ↑ The organization model of the 'Wine Producers Association of the Northern Greece Vineyard' and the 'Wine Roads of Northern Greece' ↑ Initiatives of individual companies ↑ Well trained and highly educated wine staff
Barriers	<ul style="list-style-type: none"> ↓ Underprovided governmental and municipal support ↓ Lack of coordinated actions among the suppliers of wine tourism ↓ Discouraging wine legislation ↓ Absent institutionalization of wine tourism ↓ Falling interest for wine consumption; extroversion of consumers underestimating local products ↓ Poor marketing tools ↓ Difficult pronunciation of Greek wine labels ↓ Geographic disperse of wineries and wine regions; high transportation cost ↓ Poor marketing campaigns for the beauties of Greece beyond the beaches ↓ Reluctance of hoteliers and restaurateurs to cooperate with wine tourism initiatives

6. Synthesis

6.1 Discussion

After thorough investigation of wine tourism development in Central Macedonia and a literature review upon the cases of France, Italy and Australia for the same reason, this section discusses the results of the empirical case study of Central Macedonia in comparison with those of the literature. In consideration then with the main research question of the present study, wine tourism impacts positively upon the wine industry and the local economy. The ways of achieving the later are illustrated in the Table 6.1.

According to the Table 6.1, the findings of the four case studies are consistent with the literature so far. Apparently, the most common ways of rural resurgence through wine tourism are the improvement of the region's image, the increase in tourist flows which in turn develops tourism in the region, the leverage of investments on infrastructure and other tourism facilities, the increase in local employment rates and the enhancement of the viniculture income. However, the volume of these effects on rural development is not the same for every case. What is apparent both in the literature and the case studies is that wine tourism is important for tourism destinations, although it is debatable which one of the two industries, those of wine or tourism, is the primary beneficiary. This inevitably varies from destination to destination and depends on factors such as the history of the development and the nature of the wine and tourism industry (Szivas, 1999).

For destinations employing wine tourism as a means of enhancing the wine sector's income and overcoming economic difficulties of the industry like France, wine tourism yields more benefits to the wine industry rather than contributing to the rural region's development. There are however some positive impacts on the region, but the wine sector is the primary beneficiary of the wine tourism impact. On the other hand, destinations regarding wine tourism as an instrument of rural restructuring like Italy, Australia and Central Macedonia are more implicated in marketing the whole region rather than being focused exclusively at promoting the local wines. Hence, the effects of wine tourism on the region alone are greater in such regions. Nevertheless, in the case of Central Macedonia which is a region with a long viniculture tradition but wine tourism is still at an initial stage, the later impacts on the wine industry more than it does on the region. In other words, the benefits of wine tourism are of higher volume and sooner apparent than they are for the region. In fact, local

employment rates may be positively affected by wine tourism, but the effect is rather moderate. Moreover, the rural areas where wine tourism is practiced are benefited long-term while the wine sector is benefited directly through increased cellar door sales, promotion of their new products and increased wine consumption.

Table 6.1: The effects of wine tourism on rural development

Ways of wine tourism contributing to economic development of rural areas	
Literature	<ul style="list-style-type: none"> – Attracts visitors interested in wine and thus, create new demand for the country/region – Scatters tourist flows; develops tourism in rural areas – Increases the number of visitors – Increases employment rates – Improves destination image – Adds value to the landscape, gastronomy and local culture of rural areas – Increase the income of the wine sector
France	<ul style="list-style-type: none"> – Increases the winemakers' income – Enhances long-term loyalty to the region by visitors – Increases export sales – Improves the region's image within France short-term and in foreign markets long-term
Italy	<ul style="list-style-type: none"> – Increases tourist flows; develops tourism in rural areas – Increases the region's general competitiveness – Enhances the demand for directly sold local products and services – Improves the destination image; allows for differentiation – Increases direct sales of the wineries
Australia	<ul style="list-style-type: none"> – Boosts international tourist flows – Improves overall tourism image of the country – Induces investments on infrastructure and other tourism facilities – Increases international and domestic awareness for Australian wines and wine regions
Central Macedonia	<ul style="list-style-type: none"> – Improves the region's overall image – Increases tourist flows; spreads the tourist season – Increases local employment – Enhances the viticulture income

This may be the case in Central Macedonia because it is considered an emerging market in the wine tourism field despite the country's long tradition in wine production. Thus, the amount of wine tourists' flows is not of great volume to leverage significant investments and

develop the rural region further. In addition, wine tourism in Central Macedonia cannot yet stand alone as a single motive for visitation to the region. It is most of the times part of the broader tourism experience. Hence, as the respondents have revealed, the wine tourism visitation level at this time does not justify any further investments for the wineries and vineyards or the employment of additional personnel. The benefits of wine tourism do not justify the operation and infrastructure costs. However, marketing projects and individual initiatives are capable of progressively improving the destination's image and spreading the tourist season beyond the summer months by promoting the region as a whole.

Furthermore, the academic community tends to distinguish between economic benefits of wine tourism on the region and on the wine industry (Dodd and Bigotte 1995; Day, 1996 in Hall et al., 2000). Even more, from the winery economic effects, the increased revenues for the winemakers is the one with the higher volume. However, an increased income for the wine sector increases in turn the agriculture income and enhances the local economy as a consequence. Therefore, in this sense, the increased sales effect is included in the Table 6.1 as a way of wine tourism contribution to rural development.

Moreover, another critical point emanating from the literature review is the fact that wine regions compete on equal terms with any other tourism destination. Competition thus is fierce and success or not of wine destinations' is determined by a series of factors. These are better illustrated in the Table 6.2. First and foremost is the quality of the wine. Unknown and low quality wine cannot attract wine tourists. Moreover, quality of the services provided and the whole wine country experience, the local cuisine included, are also significant elements to attract visitors at first place. Moving on, the wine country appeal comprises those features that satisfy the basic motives of wine tourists and excel the wine tourism experience, like festivals or any other cultural events. The appeal of the winery at a micro-level is the third success factors of wine tourism. Friendly and well educated staff along with a well designed and equipped winery can satisfy some of the motives of wine tourists like meeting the producer, educate wine consumers and influence the tertiary communication. Last but not least are the development and marketing efforts of the wine tourism destination. These include staff training, sign-posting, special events, joint marketing efforts, focused target marketing and image improvement (Getz et al., 1999).

Table 6.2: Determinants of wine tourism

	Success factors	Barriers
Literature ²⁹	<ul style="list-style-type: none"> – Quality (of wine, wine country experience, service) – Wine country appeal – Winery appeal – Developmental and marketing wine tourism efforts 	<ul style="list-style-type: none"> – Cost of travel – Overall appeal of other destinations – Lack of tour packages and/or knowledge about the region – Wine tourism seen as a secondary or tertiary activity for the wine industry – Product focus of winemakers and marketers – Lack of wine tourism experience knowledge – Lack of marketing and product development ability – A fragmented industry within the wine industry and between wine and tourism industry
France	<ul style="list-style-type: none"> – Long tradition in the wine industry – Leading position in world’s tourism destinations – Strong brand name of French wines – Beautiful rural landscape – Investments in facilities and staff’s education – Strong promotional tools 	<ul style="list-style-type: none"> – Burden of the wine industry’s tradition – Not all winemakers interested in wine tourism – Individualistic behavior of winemakers & vigneron
Italy	<ul style="list-style-type: none"> – Long tradition in the wine industry – Leading position in world’s tourism destinations – A vast pool of wine regions – Initiatives of individual companies – Active participation of public/private organizations – Cooperative spirit of winemakers 	<ul style="list-style-type: none"> – Rural regions excluded from tourism – Fragmented accommodation capacity – Fragmented nature of wine industry – Poor marketing and communication tools of the wine events
Australia	<ul style="list-style-type: none"> – Popular world tourism destination – Flourish of wine exports – A national wine tourism strategy – Promotion of the whole wine region – Mateship mentality among winemakers – A unique and contradictory rural landscape 	<ul style="list-style-type: none"> – Rural regions excluded from tourism – Polarized wine industry – Strong production focus of the wine firms – “cottage-industry” mentality – Lack of comprehension by local authorities – Lack of statistical data
Central Macedonia (Greece)	<ul style="list-style-type: none"> – Popular world tourism summer destination – Long tradition in the wine industry – Particular and unique wine varieties – A vast pool of wine regions – Cooperative spirit among the winemakers – Resurgence of ancient traditions in the wine 	<ul style="list-style-type: none"> – Underprovided governmental and municipal support – Lack of coordinated actions among the suppliers of wine tourism – Discouraging wine legislation

²⁹ The success factors come from the paper of Getz et al. (1999) while the barriers come from the papers of Getz and Brown (2006b) and Beverland (1998).

<ul style="list-style-type: none"> production – A multi-variety of microclimates – A unique and contradictory rural landscape – A plethora of archeological sites and other sites of cultural interest – The organization model of the ‘Wine Producers Association of the Northern Greece Vineyard’ and the ‘Wine Roads of Northern Greece’ – Initiatives of individual companies – Well trained and highly educated wine staff 	<ul style="list-style-type: none"> – Absent institutionalization of wine tourism – Falling interest for wine consumption; extroversion of consumers underestimating local products – Poor marketing tools – Difficult pronunciation of Greek wine labels – Geographic disperse of wineries and wine regions; high transportation cost – Poor marketing campaigns for the beauties of Greece beyond the beaches – Reluctance of hoteliers and restaurateurs to cooperate with wine tourism initiatives
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Hence, the literature summarizes the success factors identified in the four case studies. Quality of wine and service, a strong image destination image, a well-trained staff and effective marketing tools are among the determinants that are present in each case study. A long tradition in the winemaking and an already positive image of the destination is a key element for wine tourism success in the cases of France, Italy and Central Macedonia. Australia, on the other hand, may have only recently developed a tradition in wine production; however, it has a national wine tourism strategy and a marketing approach oriented towards promoting the region as a whole.

Moreover, another common success factor among Italy, Australia and Central Macedonia is the noble rivalry and cooperative spirit among the winemakers. This feature is of great significance as it enhances cooperation among winemakers and improves the whole wine tourism experience. This mateship mentality among them reflects to a certain point the origins of wine tourism development in those countries; that is to enhance their countryside. In addition, the cooperative spirit of wine producers in Central Macedonia functions as a response towards the lack of active and effective governmental and municipal involvement. For Greece, where there is no national wine tourism body like the Movimento Turismo del Vino in Italy or a national wine tourism strategy like Australia, the unity among the producers is considered as necessary to develop wine tourism. This is also enforced by the fragmented nature of the wine industry itself. A large number of small/medium firms induce cooperation among them. This is also true for Italy and Australia. Apparently, this is not the

case for France, where the individualistic behavior of winemakers and vineyard owners acts as a barrier for wine tourism.

Other factors determining the success of wine tourism in Central Macedonia are the unique wine varieties, the resurgence of ancient production traditions and the multi-variety of microclimates. These factors correspond to the quality factor of the literature. Finally, the natural beauty of the rural scenery and the presence of sites of cultural interest are common in all four case studies although not strictly stressed by the literature.

As far as the potential barriers of wine tourism development are concerned, these are clearly defined in the literature. With regards to the overall appeal of other destinations, this summarizes the enormous development of general tourism destinations worldwide which makes the attractiveness of the wine tourism destinations alone even harder (Getz and Brown, 2006b). As indicated from the Table 6.2, the barriers identified in the case studies are consistent with the literature. Remarkable is however that although the fragmented wine industry constitutes a barrier for Italy and Australia, this is not valid for the case of Central Macedonia. None of the respondents have indicated this feature as a barrier. Rather, it even enhances cooperation within the industry as already mentioned. Another inhibitor of wine tourism development present only in the Greek case is the one of the cost of travel. The geographic disperse of the wine regions and the wineries within the same region increase the cost of travel and often suspends visitation to wineries and vineyards. Likewise, the fact that wine tourism is seen as a secondary/tertiary activity for the winemakers is only present in the case of France while a strong production focus is encountered in France and Australia. This can partially explain the individualistic behavior of the wine tourism supply side in France.

Furthermore, poor marketing and communication tools are present in the Italian and the Greek case. Although Italy has a national wine tourism body, its wine events and festivals are not well communicated. The same applies for the marketing efforts of Central Macedonia. Even more, there is a lack of worldwide awareness for the natural beauties of Greece beyond the beaches. Nevertheless, the biggest barrier for Central Macedonia is the underprovided governmental and municipal support. This also enhances a lack of coordination between the wine industry and tourism bodies. The level of involvement of the State or the local authorities determines either the success or the underdevelopment of wine tourism. For the Greek case, the level of State's implication into wine tourism is rather discouraging and prevents winemakers and tourism service providers to enter this business

field due to high investment costs. The aforementioned can be even considered as a paradox since wine tourism in Greece was motivated in order to enhance rural development and increase the winemakers' income. Hence, the government, at least at a regional level should be more implicated into this practice as the Australian and Italian government are. Finally, it can be said that the reluctance of hoteliers and restaurateurs to cooperate with wine tourism initiatives and the poor signage of the wine regions in Central Macedonia reflect to a certain degree the "cottage-industry" mentality of wine tourism in Australia.

Consequently, the major success factors for wine tourism development deriving from the literature and the case studies are namely the quality of wine and service, an already strong destination image, effective marketing tools, active support by the State and a spirit of cooperation among the producers. On the contrary, major inhibitors for excelling wine tourism are the inactive involvement of the State, poor marketing tools, the cost of travel, a fragmented wine industry and a lack of coordinated actions among the suppliers of wine tourism. Moreover, from the overall discussion upon the four case studies, it can be concluded that Central Macedonia is closest to the Italian case since these two demonstrate the most common features concerning wine tourism development and the wine industry itself.

6.2 Conclusion

This section concludes the present study, basic objective of which was to contribute to the existing literature by answering to the basic research question: how can wine tourism contribute to the economic development of the rural areas? (See section 1.2). The basic research question, although broad in range, has been answered through the literature review and the case of Central Macedonia (Greece).

Throughout the years, tourism has evolved into one of the most profitable and fastest growing economic activities throughout the world (UNWTO, 2013) and thus constituting one of the most significant contributors for the national economies. However, as the case studies of France, Italy, Australia and Central Macedonia have indicated, rural areas are often excluded from tourism. Hence, rural regions do not enjoy the economic benefits tourism brings along (Beames, 2003; Presenza et al., 2010). Therefore, wine is often seen as a strong tourism asset in order to boost local economy of rural areas, often depressed ones and/or enhance the wine industry's income. Studies so far, have concluded to the positive contribution of wine tourism to rural growth and increased revenues for the wineries (Charters and Ali-Knight, 2002, Carlsen, 2004 and Hall et al., 2000). The overview of the literature and the four case studies derive some conclusions regarding the means of rural development by wine tourism (see Table 6.1).

Consequently, wine tourism constitutes a niche market of general tourism revolving around the wine theme, originated from the agro-tourism development and often associated with gastronomy experiences sought during visitation to tourism destinations. In particular though, wine tourism is seen as a means of rural resurgence and enhancement of the wine sector's income. The former is achieved through the increased viniculture income itself, the improvement of the region's image, the increased tourist flows and overall tourism development in the region, the leverage of investments on infrastructure and other tourism facilities and the increased local employment rates. Nevertheless, the contribution of wine tourism on rural development, if well managed, is long-term and thus may be readily long-lasting since the overall image of the region is improved based on local distinctive features. This in turn, allows for differentiation of the local economy founded on the region's own natural resources. In fact, Glaeser (2005) claims that diversification of a region's is the key for its restructuring and survival in times of decline. Hence, this may even be the greatest

benefit wine tourism yields to a region and is of particular importance for rural provinces facing the outcome of the recent world financial crisis.

6.3 Policy recommendations for wine tourism actions

The overview of the literature so far and the case studies analysis reveal the multi-complexity of the factors determining wine tourism development. As Getz et al. (1999) also argue for, there is a plethora of various factors influencing the success of the wineries alone and the destination's success in growing its market share in the wine tourism field. Nevertheless, a country's or a region's distinctive features along with the wine industry's characteristics indicate different success factors or barriers for each case (see Table 6.2). After all, these factors determine a successful wine tourism development. Hence, taking these determinants in consideration, some policy recommendations can be derived for the case of Central Macedonia. These are the following:

The establishment of a national wine tourism body

To begin with, the most significant barrier of wine tourism development in Central Macedonia and in Greece in general is the inertia of the State. The literature and the case studies as well, indicate that an active role of the government at a national level and of the municipalities at a regional level is necessary to make the stakeholders of wine tourism aware of its benefits, coordinate wine tourism actions and strategies among these actors and provide them with financial support when the cost of entry is prohibitive for entrepreneurs. A national wine tourism body like the Movimento Turismo del Vino in Italy is the appropriate governing body to design national wine tourism strategies as it is practiced in Australia, coordinate individual actions from the various suppliers of wine tourism while catering for a collective action aimed at excelling the whole wine tourism experience. The set up of such a governing body can then pave the way for the second recommendation:

The institutionalization of wine tourism in Greece

Institutionalization of wine tourism is of great significance and support for emerging markets in wine tourism. It is a necessity for a better function of the wine tourism supply side. Its institutionalization will define the dimensions of wine tourism, set common entry

prerequisites for interested entrepreneurs and will contribute to its treatment as a separate tourism market. Above all, institutionalization of wine tourism will contribute to its embeddedness in urban governance. In other words, it is what Braun (2008) has argued for city marketing. When city marketing is embedded in urban governance, it is then incorporated into political priorities and policy agenda. In addition, it is set under political responsibility (Braun, 2008). Likewise, the same can be applied for wine tourism if clearly defined and institutionalized. It could then be readily set under the policy agenda like the one already implemented for general tourism since it is one of the most profitable industries in Greece.

Moreover, the state or the municipality should undertake the costs of infrastructure and other general tourism facilities intended to improve the overall attractiveness of the region. Suppliers of wine tourism can develop the facilities and services provided at the firm level but cannot cater for common facilities and activities provided in the region. Furthermore, since wine tourism cannot stand alone at an initial stage, other activities and services in the province must be provided as well. For example, the restoration of archaeological sites in the Prefecture of Pella and the reconstruction of ancient and byzantine churches in the Municipality of Thermaikos (Prefecture of Thessaloniki) have attracted a remarkable number of visitors while a significant part of them visited the wineries and vineyards located near these attractions. Thus, derives the third recommendation:

Coordinated action among the wine industry, tourism and other cultural competent bodies

The example above requires the coordinated action among the competent Curator of Antiquities, the competent tourism bodies and the relevant municipalities. Therefore, since wine tourism is a multidimensional phenomenon with many ramifications, coordination among the different actors is an impetus. Consequently, all the three recommendations so far, will then pave the ground for the fourth recommendation concerning the marketing of wine tourism.

Aggressive and penetrating wine tourism marketing into the foreign markets

A strong presence of the Greek bottled wines in international fora and fairs will first make the wine industry's professionals aware of the Greek quality wine. This in turn induces international interest for the location and methods of production. Then, after putting the bottled wine of Greece in the world wine consumption map, an aggressive marketing is needed to turn this interest into actual visitation to the Greek wine regions. Wine tourism

marketing campaigns thus deserve equal attention and quality with those of general tourism. Moreover, what is even more a necessity is the marketing and communication of the various beauties of the country beyond its coastline. Increasing awareness of the country's natural beauties and the various activities that can be exercised in the Greek countryside, will leverage visitation beyond the summer months and spread this way the tourist season, which is of great importance for the rural areas. Another recommendation at the firm level this time is the following:

A well-trained and educated staff completes the wine tourism experience

The scientific training of the winery staff is an impetus to support the whole wine tourism experience for the visitor. A well-trained staff is capable of communicating all the wine-related knowledge to the visitors and thus trains the future wine consumers. Additionally, a qualified staff is also in position to provide gastronomic advice to visitors. Anyhow, a culinary experience is also a motive for wine tourism and tourism in general. Furthermore, the presence of highly educated personnel is also capable of increasing cellar door sales and positively influencing the word of mouth reputation of the wineries. A final recommendation in operational terms is the:

Effective sign-posting of the Wine Roads

As a final remark concerning wine tourism development is the effective sign posting of the wine routes. This may constitute a last policy recommendation but is not of minor importance. Good sign trails will facilitate the wine tourism experience of visitors who is often a frustrating one due to insufficient signage and lack of information about the various activities/attractions at the region. The 'Wine Producers Association of the Northern Greece Vineyard' is already catering for the effective signage of the 'Wine Roads of Northern Greece' but there is still room for improvement. A good and comprehensible signage of the Wine Roads will both improve the travel experience to wine regions and motivate visitation to a winery or vineyard even if this was not the primary aim of the travel.

In any case, the ultimate goal for an emerging wine tourism market like Greece is the creation of a wider wine education and culture which will in turn enhance the involvement and identification with the product and induce motivation to discover the wine production locations.

6.4 Recommendations for further research

Despite the fact that wine tourism is undoubtedly a growing market with significant economic and social effects, there has been a relatively little literature body regarding its systematic study. Issues like wine tourism development, its management and marketing and the ways in which tourists experience wine tourism are still understudied (Hall et al., 2000). Moreover, as Charters and Carlsen (2006) indicate, there is a limited comprehension of the ways wine tourism operates, the visitors' requirements and the necessary factors for its effective implementation. In this context, the present study has contributed to the wine tourism literature gap by deriving some conclusions on the manners of wine tourism impacts on economic rural development in general and by shedding more light into the wine tourism in the case of Central Macedonia in particular.

However, there are still subjects that need further research in order for the systematic study of this phenomenon to be developed. Therefore, the present study constitutes a stimulus for further research. Specifically, future studies could focus on the following topics concerning the rest of Greece:

- Recording of the current situation of wine tourism development and investigation of the wine tourist behavior.
- Study of the satisfaction level of winemakers involved in the tourism business and how has the later contributed in rural development.
- The ways in which wine tourism contributes to social development of the rural areas where it is practiced.
- The manners in which the wine tourism networks function.

It would be also interesting and insightful as well for the last two recommendations for further research to be examined at a broader level. Social impacts of wine tourism are of great significance and may induce further involvement of actors in the phenomenon. Moreover, comprehending how the wine tourism networks function is of great help for the competent authorities in their effort to develop its practice further. In addition, the Table 3.1 which illustrates an overview of the international wine tourism development literature indicates some literature gaps as well. For instance, most of the relevant literature is focused on the New World countries while there is minor attention given to the demand side of wine tourism compared to the studies concerning the supply side. Furthermore, policies and marketing strategies and performance of wine tourism are two other topics which are often

understudied. Hence, some recommendations for further research at a broader level are the following:

- Market segmentation of wine tourists and thorough investigation of the motives stimulating visitation to the wineries.
- The satisfaction level of wine tourists and what are their demands from the suppliers.
- Thorough investigation of wine tourism practice in the Old World countries. In depth comprehension of their stimuli to implicate in wine tourism and how it is seen from the suppliers' view.
- Identification and organization of effective policies and marketing strategies to better communicate the wine tourism experience and attract more visitors to the destination.
- Recording of the wine tourism performance; identifying its strengths and weaknesses.
- Study of the post-visit effect on stimulating potential re-visits to the destination and on wine consumption.

With regards to the first two recommendations, these will shed light to the wine tourist behavior and will facilitate the role of marketing in attracting more of them. Above all, an effective marketing is based on good comprehension of its target market. Moreover, the third recommendation aims to identify wine tourism development in the Old World and even more, the reasons of its underdevelopment compared to the New World countries (Gatti et al., 2003; Charters, 2009). Moving on, an insightful analysis of wine tourism marketing is also necessary since the case studies have indicated poor marketing as barrier for successful wine tourism development. In addition, measuring wine tourism performance with the use of indices or qualitative research methods is of great importance in order to assess the real impacts of wine tourism on the wineries and on the local society as well. Finally, studying the post-visit effect will also contribute to the understanding of the ways wine tourism effects on visitors and on the wineries and the region as well.

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Appendix

The interview questions for the semi-structured personal interviews were the following:

- *Questions concerning the wine tourist*
 1. What is usually the age of the visitors?
 2. The majority of the visitors are Greeks or foreigners?
 3. What time of the year is there an increase in the visitors' flow?
 4. Which do you think are the main motives of your visitors?
- *Questions concerning the supply side of wine tourism*
 1. Which services does your winery offer to the visitors?
 2. Which do you think is the main element of the region that it should be further developed in order to attract more wine tourists?
 3. Why should a wine producing firm enter the wine tourism business? Which are the benefits for the firm?
 4. What is your relationship with the other members of the 'Wine Routes of Northern Greece' (wine producers, hotels, restaurants and local authorities)? Did the membership in the Wine Routes of Northern Greece' enhanced those relationships? Is there any concrete example of such a relationship?
 5. What is your relationship with the policy makers of wine tourism? What is their role?
Questions specifically for policymakers:
 6. *What is the role of the policymakers in wine tourism?*
 7. *To what extent are they involved and why?*
 8. *Why should policymakers be interested in developing wine tourism?*
 9. *Which policies have been developed for developing wine tourism?*
- *Questions concerning the advantages and disadvantages of wine tourism*
 1. Do you think that wine tourism has a future prospect as a business activity for the economic progress of the region? If not, why not?
 2. In your opinion, why has wine tourism a positive impact for the development of tourism in general in the region of Central Macedonia?
 3. Did you have any negative experience from visitors in your winery/vineyard? Is there any concrete example?
 4. Do you think that wine tourism has developed the image of the region of Central Macedonia and if yes, why?
 5. It is said that wine tourism is a stimulus for the attraction of foreign investments in the region. Do you have any personal experience of attracting any foreign investment after entering the wine tourism business?
 6. One of the perceived benefits of the wine tourism is that it can spread the tourist season throughout the year. Why do you think that the development of wine tourism in Central Macedonia could contribute to the increase of the tourist season throughout the year?

7. Do you perceive any barriers for the development of wine tourism in Central Macedonia? If yes, why? If not, why not?
- *Questions concerning the Wine Routes*
 1. Since when is your firm member of the trademark « Wine Routes of Northern Greece»?
 2. Do you think that the membership in the wine routes has contributed in the increase of your firm's employees?
 3. Do you think that the membership in the wine routes has resulted in larger sales and profits for your firm? If not, why not?
 4. Has the participation in the wine routes strengthened the prestige of your brand? Has it contributed to increase export sales? In what way?
 5. Do you perceive any drawbacks from this membership? If yes, are there any concrete examples to support it?
 6. Do you consider any barriers for wine tourism in Central Macedonia? If yes, what are these and why do you think they are present?
 7. Was your company a grant beneficiary from the LEADER + program?
 8. If yes, why was that an incentive to enter the « Wine Routes of Northern Greece»? If it wasn't an incentive, what is the reason? What was your incentive?
 9. Do you think that participation in the LEADER + program has resulted in you firm's growth? In what way?

Questions addressed to wine producers that are not members of the 'Wine Routes of Northern Greece':

1. Why is your firm not a member of the « Wine Routes of Northern Greece»?
2. Have you applied for a membership in the past?
3. Do you consider being a member in the near future?
4. Do you offer any wine tourism services despite the fact that you are not an affiliate member of the « Wine Routes of Northern Greece»? If yes, why is that? Do you perceive any benefits from being involved (at least partially) in wine tourism?
5. Is there enough information about the membership in the « Wine Routes of Northern Greece»? If not, is it an inhibitor to enter the wine roads?
6. Is there enough information from local authorities on the benefits of wine tourism for the rural area where it is being practiced and for the wine makers involved? If not, is it an inhibitor to enter the wine tourism business?
7. Do you consider any barriers for practicing wine tourism? If yes, what are these and why do you think they are present?