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Enotourism in North Macedonia – current state and future prospects

Abstract: North Macedonia, the country located in the middle of the Balkan Peninsula, is known for its wine-growing culture, and is divided into three wine regions with around 80 operating wineries. It is also surrounded by countries where vines have been grown and wine produced since the ancient times. The paper presents the history of North Macedonia as a wine-growing country, and provides an overview of its enotourism offer. An inventory of winery offers based on their official websites and Facebook profiles was performed, including the analysis of the surveys conducted among enotourists. Said surveys targeted participants of the Tikveški Grozdober festival in particular. It should also be mentioned that several of them were completed by Macedonian residents. The survey results outline a socio-demographic profile of the enotourists coming to this country and their enotouristic experience. The article sheds light on the history of winemaking and presents wine regions in North Macedonia.

Keywords: wine tourism, wine regions, North Macedonia, Balkans, wine tourist profile

1. Introduction

Enotourism, also known as wine tourism, refers to tourist trips specifically to wine-related destinations, allowing the visitors to understand viticulture methods, along with the processes behind wine production. What is more, it offers an opportunity to taste and purchase various wine products, and participate in festivals dedicated to wine (Kowalczyk, 2010; Woźniczko et al., 2015). Wine tourism is based on cultural heritage and strongly influences the development of tourism as such in certain areas, e.g. in Slovenia (Jurinčič and Bojnec, 2009), Vojvodina Province in Northern Serbia (Trišić et al., 2019), La Mancha, La Rioja and Penedès regions in Spain (Duarte Alonso and O'Neill, 2009), and the Spanish-Portuguese region of Duero (Charzyński et al., 2017). Culinary tourism combines business with pleasure and results in the growth of the branch. Tourists are willing to go to remote places in search of new flavours, especially if said destinations are known for a particular product (Nowak and Czarnecka-Skubina, 2011).

North Macedonia lies in the middle of the Balkan Peninsula, surrounded from all sides by countries where vines are grown and wine is produced. Globally, the total area of vineyards covers 7.4 million hectares (Statistical Report on World Vitiviniculture, 2019), and it so transpires that a fair number of Balkan states are featured in the global statistical summary of main vineyards – the list encompassing countries with wine regions of more than 32 thousand hectares. In fact, Romania ranks 10th on this list, whereas Greece (North Macedonia's southern neighbour) is in the 17th place, and Bulgaria (the eastern neighbour) is ranked 25th. As for the summary of ten major grape producers, Romania placed 27th – having produced 378,283 tonnes of wine in 2014 – making it the only Balkan country that is listed there (Statistical Report on World Vitiviniculture, 2019). There are also other countries within the Balkan Peninsula that participate in the wine market, such as Greece, Serbia, Bulgaria, Croatia, Albania, and Montenegro. In the year

2014, Greece produced 334,300 tonnes of wine, Serbia 198,183, Bulgaria 130,500, Croatia 45,272, Albania 17,500, Montenegro 16,000, while North Macedonia 51,013 tonnes (Wine production data: <http://www.fao.org/faostat/en/#data/QD>).

Although the Balkan countries exhibit high potential for growth in terms of enotourism, the actual development in this area is relatively slow. Unfortunately, only few authors are interested in researching this very issue due to the fact that enotourism is often considered only as a factor in economic development. For instance, when it comes to wine tourism in Serbia, it has been described by Pivać et al. (2009) and Škrbić et al. (2015). In regards to Montenegro, S. Milošević (2016) tried to assess the growth not only in tourism by and large, but enotourism as well. What is more, the Danube Valley in Austria is naturally predisposed for the development of culture, sports and recreational, nautical, wine as well as event tourism (Lukić et al., 2012). It should also be mentioned that V. Dimitrov (2017) described the possibilities of wine tourism development in Bulgaria. The history of wine production in this country is 2500 years old (Hudelson, 2014), and the quality of the wine produced there has the greatest impact on this very branch of tourism (Terziyska and Geogiev, 2014). The wineries themselves, however, are not best-suited for tourists, although they offer restaurants and organised trips. Then again, Bulgaria's accommodation infrastructure is well-developed. The most common problem is the poor quality of access roads and lack of proper information regarding the location of the wineries as such. In truth, the same applies to Romania and Serbia (Hudelson, 2014). As for

wine tourism in Romania, it has been described by M. Manila and Barhalescu (2013) and E.L. Drăghiceanu (2017). The biggest obstacle for enotourism development is the winemakers' reluctance to open their wineries to tourists. On top of that, their English language skills are often at a low level and the quality of accommodation and catering services poor. Croatia, on the other hand, is the unquestionable leader in adapting to tourist needs. Accommodation and transport infrastructure have reached the same level as in most EU countries. Croatia has become the most visited country in the Balkans, frequented mainly by Italians, Germans, and Austrians (Hudelson, 2014). As a result, the vineyards are more tourist-oriented, and many of them have begun to accept visitors without prior notice. In addition, most of Croatia's wineries now have English speaking staff. M. Meler (2015) delineated the impact of enotourism on the rural areas of this country in the article titled „Wine tourism as a centripetal force in the development of rural tourism”.

The aim of this article is to provide the reader with an overview of the enotourism offer within the area of North Macedonia. For this purpose the author performed an inventory of winery offers based on official websites and Facebook profiles (chapter 4), including the analysis of the surveys conducted among enotourists (chapter 5). The survey results facilitated outlining a socio-demographic profile of enotourists coming to this country and their enotouristic experience. Furthermore, the paper discusses the wine regions in North Macedonia, as well as the history of winemaking prior to reaching the empirical part of this article.

2. History of North Macedonia as a wine-growing country

Today's North Macedonia is located in the area of ancient Macedonia, which belonged to the Eastern Roman Empire. The history of winemaking in this Balkan country began in antiquity in the times of Phillip II and Alexander the Great. Until the 7th century, this region was considered one of the most important places for growing grapes (Hristovski, 2009). At that time, wine served as a drink for all social classes and was also used as a payment method. Winemak-

ing was developing freely until the fourteenth century. During the times of the Ottoman Empire (years 1350–1918) wine was produced in monasteries. The oldest still existing Macedonian winery dates back to 1885 (Larrachea, 2009). In the second part of the nineteenth century, phylloxera appeared in Europe, causing tremendous losses in vineyards. This pest reached North Macedonia rather late but many vineyards had to be grubbed up and excluded

from production (Stojanovski, 2013). Having said that, this Balkan republic accounted for around two-thirds of the Yugoslavian wine production. After the breakup of Yugoslavia, the wine production of the new country decreased several times (Robinson, 2006).

The climate of the Balkan countries, which is a combination of both Mediterranean and continental climates, is conducive to viticulture. In summer, the days are hot and nights brisk (Winery Popova Kula in Demir Kapija: <http://www.popovakula.com.mk>). Average temperatures during this season fluctuate between 24°C and 40°C, and in winter between 0°C and 2°C. The number of sunny days per year amounts to 260 (Stamatoski, 2015), which is a favourable factor for ripening grapes. Long sunny days and cool nights ensure strong sugar concentration, deep colours, and fine wine aromas. In North Macedonia, the winds are calm, and precipitation reaches about 500 mm per year, making it a dry climate – ideal for wine growing (Stamatoski, 2015).

Wine, after tabacco, is the second most-exported product in North Macedonia (Winery Popova Kula in Demir Kapija: <http://www.popovakula.com.mk>). 85% of the bottled wine produced there is exported most of all to the countries of former Yugoslavia (Wine regions: <http://winesofmacedonia.mk>).

Numerous types of grapes that are indigenous for North Macedonia are grown in said region. The red varieties include Stanushina, Prokupec, Vranec, Kratosija, while the white ones are Smederevka, Žilavka, and Temjanika (Larrachea, 2009; Stamatoski, 2015).

Stanushina is a very demanding type of grapevine and is produced by one particular winery in North Macedonia only – Popova Kula. The wine from this strain can be recog-

nized by its characteristic pale colour. The taste is rich in aroma with a hint of strawberries, raspberries, and other fruit notes (Hristovski, 2009). The wine strain called Prokupec is a forgotten Balkan type which can be found only in North Macedonia now. The grapes have a dark blue tint and thick skin. This strain is most suitable for mixing and strengthening red wines. They are of the ruby red colour, and the aroma resembles cherries (Stojanovski, 2013).

The most important and leading grape variety in North Macedonia is Vranec. Cultivated throughout the country, it accounts for over half of the production of red wine in this area (Larrachea, 2009). The aroma of the Vranec wine is similar to strawberry jam, wild berries, chocolate, and liqueur (Hristovski, 2009). Another strain of Macedonian's red grapes is Kratosija. It has a long history since said grapes were grown already in antiquity. They ripen at the end of September, and the drier parts of North Macedonia are conducive to their growth. The wine is sweet and intense in colour (Hristovski, 2009). Smederevka is a leading grape variety in the production of white wine and is most common in the region of Povardarie. It requires specific growing conditions, namely a warm climate and suitable soils. The wine has a fine aroma (Stojanovski, 2013). The white grape Žilavka can be found in the following subregions: Veles, Ovche Pole, and Tikveš. It does not need fertile soil for cultivation. It is most often grown on dry, rocky and calcareous soils. Said grape is characteristic for its fruity-nutty aroma (Stojanovski, 2013). Temjanika is a vine type used to produce wines with thyme aroma. In fact, it can also give the sharp notes of nutmeg, as well as apricot, dry plum and orange. The wine is a Muscat type and has an intense yellow-gold colour with a shade of green (Hristovski, 2009).

3. Overview of wine regions of North Macedonia

North Macedonia is divided into three wine regions: Povardarie, Pcinja-Osogovo, and Pelagonija (Fig. 1). The first of them splits the country in two parts, stretching from North to South in its exact centre. This is the area where most vineyards are located. What is more, this very region covered 83% of total wine production in the year 2015 (Koteski et al., 2016).

The contribution made by the Povardarie region in this regard is still increasing – total wine production amounted to 87.4% in 2018 (Wine regions: <http://winesofmacedonia.mk>). As such, this region is divided into four subregions: Skopje, Veles, Tikveš, and Gevgelija (Stojanovski, 2013).

The name of the Tikveš subregion refers to the oldest and still working winery in the area. This is precisely where the majority of vineyards of North Macedonia can be found. There are as many as 39 plantations here (Table 1), 20 of them being located in the city of Kavadarci itself (Fig. 2). The names of the other three subregions are derived from their largest cities: Gevgelija-Valandovo, Vales, and Skopje. It should be noted that only around 6–7 wineries are found in this territory.

Another one of the three wine regions in North Macedonia is Pcinja-Osogovo. Divided into six subregions, it extends throughout the entire eastern part of the country but covers only 4% of total wine production (Koteski et al., 2016, Fig. 1). In Pijanec, there are no market-oriented wineries, whereas other two subregions – Kratovo and Kochani – exhibit potential in this field. As for Ovche Pole and Kumanovo, one may find 4 wineries there. Most of them are situated in the southern part of the Pcinja subregion.

Finally, the Pelagonija-Polog region constitutes the western part of North Macedonia. Even though only four wineries are operating in this area, 13% of the country's wine is produced there (Koteski et al., 2016). All these

Table 1. Comparison of Macedonia (based on Stojanovski's map, 2013) the number of wineries in the wine regions of North

Region	Subregion	Number of wineries
Povardarie	Tikveš	39
	Gevgelija-Valandovo	7
	Vales	6
	Skopje	7
Pcinja-Osogovo	Strumica	5
	Ovche Pole	4
	Kumanovo	4
	Kratovo	1
	Kochani	1
	Pijanec	0
Pelagonija-Polog	Ohrid	2
	Bitola	1
	Prespa	0
	Prilep	1
	Kichevo	0
	Tetovo	0

facilities are located in the southern part of the region: two of them in Ohrid, and the other in the nearby major cities – Bitola and Prilep.

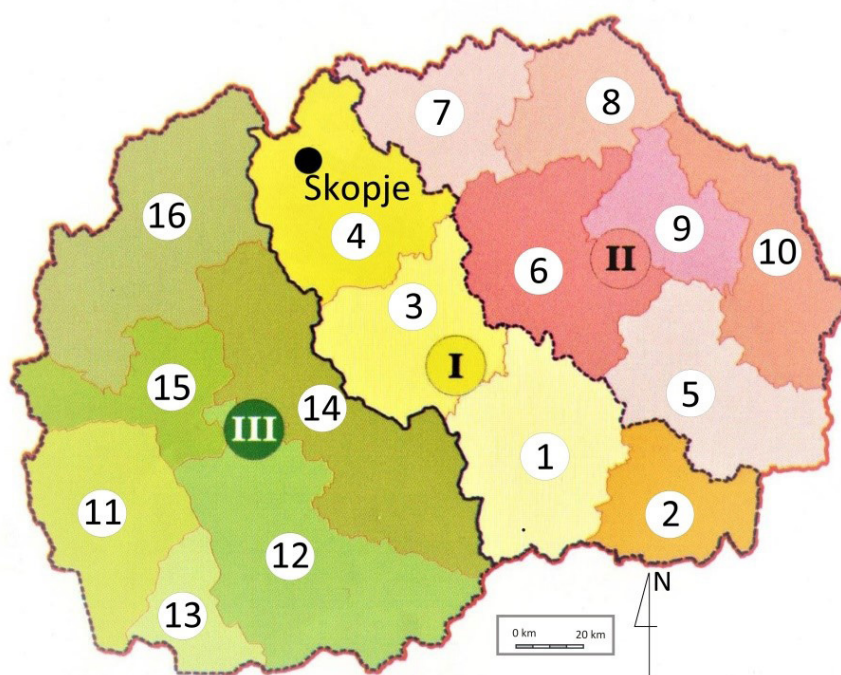


Figure 1. Map of wine regions and subregions in North Macedonia (source: Stojanovski, 2013; modified), where: I. Povardarie wine growing region (1. Tikveš, 2. Gevgelija-Valandovo, 3. Vales, 4. Skopje), II. Pcinja-Sogovo wine growing region (5. Strumica, 6. Ovche Pole, 7. Kumanovo, 8. Kratovo, 9. Kochani, 10. Pijanec), III. Pelagonija-Polog wine growing region (11. Ohrid, 12. Bitola, 13. Prespa, 14. Prilep, 15. Kichevo, 16. Tetovo)

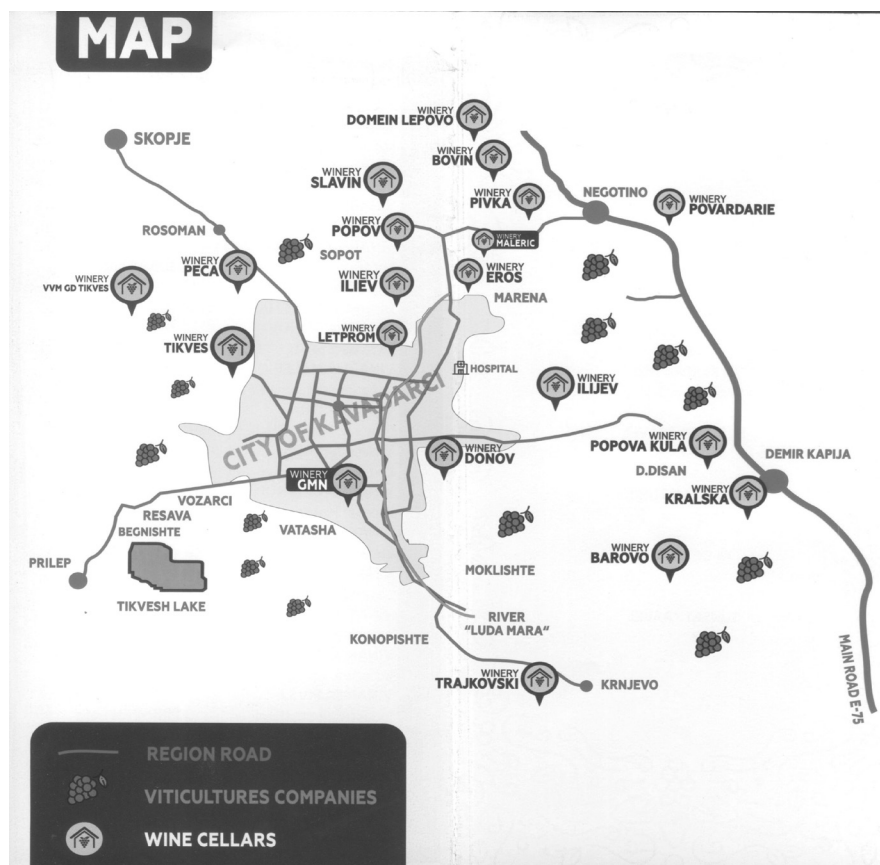


Figure 2. Map of wineries located in the Kavadarci municipality (source: Stojanovski, 2013)

4. Inventory of enotourism offer in North Macedonia

The inventory of enotourism offer was mainly based on the wineries (78) found in the leaflets promoting this country, prepared by the Agency for Promotion and Support of Tourism in the Republic of North Macedonia in 2013. The information found on a wine-oriented website reading that 74 wineries were already registered there in 2018 contributed to said inventory as well (Wines of Macedonia: <http://winesofmacedonia.mk/key-figures>). A facility called Queen Maria was also added to the list as it is a perfect example of a developing winery. Overall, the data were obtained from official websites and Facebook profiles.

The data collected for the purpose of this article concern the tourist services offered on the wineries’ websites (Table 2), as well as wine production as such (Table 3). The selection of data depended on the amount of information available on the Internet. Out of 78 analysed wineries, only 28 are active on the Internet. On their websites and profiles, they present information about their activities, sometimes in

even greater detail. Almost all of the 28 wineries have their own websites – only 8 of them have inactive domains. Compared to this medium, their profiles on Facebook focus more on the current state of affairs.

The availability of the tourist offer and its response to the needs of tourist traffic in the region was analysed as well. Based on the collected data, it so transpires that only 18 in 28 wineries provide information about opening hours. However, the designated visiting time does not guarantee the possibility to take advantage of the offer, considering that most North Macedonian wineries ask for booking in advance. About a quarter of said facilities are open from Monday to Friday (28%), several of them being available on Saturdays as well. It should be emphasised that 45% remain open for visitors throughout the week.

Wineries are usually open from early in the morning, starting between 7 and 9 a.m. There are exceptions where they start working almost in the afternoon (10 a.m.–12 p.m.).

Table 2. Enotourism services of selected wineries in North Macedonia (inactive – inactive domain, A – accommodation, R – restaurant, S – shop with own wine, TR – testing room, W – walk through the vineyard, WT – wine cellar tours (winery tours)) (based on the official winery websites and Facebook profiles, January 2020)

Winery	Location [subregion]	Year of establishment	Website	Facebook profile	Opening days and hours	Tourist services
Antigona	Tikveš	2011	yes	yes	Monday–Sunday 12 a.m.–8 p.m.	N/A
Bord Life	Skopje	2008	inactive	yes	Monday–Sunday 7 a.m.–10 p.m.	TR
Bovin	Tikveš	1998	yes	yes	Monday–Friday 8 a.m.–4 p.m.	TR
Brusani	Skopje	1938	inactive	yes	N/A	N/A
Chateau Kamnik	Skopje	2004	yes	yes	Monday–Sunday 8 a.m.–4 p.m.	A, R, S, TR, W, WT
Dalvina	Strumica	2008	yes	yes	Monday–Saturday 7 a.m.–3 p.m.	N/A
Dudin	Tikveš	1989	yes	yes	Monday–Saturday 7 a.m.–3 p.m.	TR
Ezimit	Stip	1995	yes	yes	N/A	N/A
Filovski	Tikveš	2005	yes	yes	N/A	N/A
Imako Vino	Ovche Pole	1989	yes	yes	Monday–Saturday 7 a.m.–5 p.m.	R
Izvorno	Veles	N/A	inactive	yes	N/A	N/A
Kabranov	Tikveš	2008	inactive	no	N/A	N/A
Kartal	Skopje	1979	yes	yes	Monday–Saturday 12–6 p.m.	TR, WT
Lozar	Bitola	1966	yes	yes	Monday–Sunday N/A	A, R,
Maleric	Tikveš	2004	inactive	yes	Monday–Saturday 8 a.m.–7 p.m.	N/A
Ohrid	Ohrid	1958	no	yes	N/A	N/A
Popov	Tikveš	2001	inactive	yes	Monday–Friday 10 a.m.–6 p.m.	TR, W
Popova Kula	Tikveš	2005	yes	yes	Monday–Sunday 8 a.m.–11:30 p.m.	A, R, S, TR, W, WT
Queen Maria	Tikveš	1928	yes	yes	Monday–Sunday 10 a.m.–4 p.m.	A, R, S, TR, W, WT
Skovin	Skopje	1979	yes	yes	Monday–Friday 8 a.m.–4 p.m.	S
Stobi	Tikveš	2009	yes	yes	Monday–Saturday 10 a.m.–6 p.m.	R, WT
Tikveš	Tikveš	1885	yes	yes	Monday–Friday 9 a.m.–4 p.m.	R, S, TR, WT
Tristo	Veles	2005	yes	yes	N/A	TR, WT
Trajkovski	Tikveš	1922	yes	yes	N/A	N/A
Valandovo	Gevgelija	1948	yes	yes	Monday–Sunday 9 a.m.–4 p.m.	TR, WT
Vardarska dolina	Tikveš	2000	inactive	yes	N/A	N/A
Venec	Tikveš	N/A	inactive	yes	Monday–Saturday 7 a.m.–2:30 p.m.	N/A
VVM GD Tikveš	Tikveš	1999	yes	yes	N/A	N/A

Table 3. Summary of the information concerning the production of selected wineries in North Macedonia

Winery	Vineyards [ha]	Production of wine	Export [countries]	Red wine strains	White wine strains
Bovin	60	1.5 mln bottles/year	36	Vranec, Cabernet Sauvignon, Merlot, Pinot Noir.	Chardonnay, Sauvignon Blanc, Riesling, Muscat, Temjanika, Traminac, Smederevka.
Chateau Kamnik	16	100 K litres/year	13	Merlot, Pinot Noir, Vranec, Cabernet Sauvignon.	Pinot Grigio, Sauvignon Blanc, Temjanika, Chardonnay.
Dalvina	370	5 mln litres/year	14	Vranec, Cabernet Sauvignon, Cabernet Franc, Merlot.	Chardonnay, Temjanika, Muscat.
Ezimit	400	5 mln bottles/year	14	Vranec, Kratosija, Plavac, Cabernet Sauvignon, Merlot, Pinot Noir, Shiraz.	Temjanika, Zilavka, Riesling, Chardonnay, Sauvignon Blanc, Viognier.
Imako-Vino	650	10 mln litres/year	N/A	Vranec, Cabernet Sauvignon, Merlot, Pinot Noir.	Chardonnay, Temjanika, Riesling, Smederevka.
Popov	5	150 K litres/year	13	Cabernet Franc, Merlot, Sauvignon.	Traminac, Chardonnay, Temjanika.
Skovin	150	16 mln litres/year	18	Cabernet Sauvignon, Merlot, Vranec.	Chardonnay, Muscat, Traminac, Temjanika, Sauvignon Blanc, Smederevka.
Stobi	600	4.5 mln litres/year	12	Sarah, Merlot, Merlot, Vranac, Cabernet Sauvignon, Pinot Noir.	Chardonnay, Muscat, Riesling, Rkaciteli, Zilavka, Graševina, Smederevka.
Tikveš	Own: 1,000 Controlled: 5,000	15 mln bottles	6	Kavadarka, Kratosija, Vranec, Cabernet, Merlot, Plavac.	Smederevka, Graševina, Zilavka, Traminac, Temjanika, Chardonnay, Grenache blanc, Muscat Ottonel, Sauvignon Blanc, Rkaciteli, Viognier.
Tristo	3.5	30 K litres/year	N/A	Cabernet Sauvignon.	Chardonnay.
Valandovo	500	5 mln litres/year	5	Vranec, Cabernet Sauvignon, Merlot.	Smederevka, Riesling, Zilavka, Belan.

The data selection depended on the amount of information available on the official winery websites and Facebook profiles, January 2020: Winery Antigonina in Negotino, Winery Borg-life in Skopje, Winery Bovin in Negotino, Winery Brusani in Skopje, Winery Dalvina in Bosilovo, Winery Dudin in Negotino, Winery Ezimit in Stip, Winery Filovski in Przdevo, Einery Imako-Vino in Stip, Einery Izvorno in Dolno Vranovtsi, Winery Kabranov in Negotino, Winery Kartal in Skopje, Einery Lozar in Bitola, Winery Maleric in Negotino, Winery Ohrid in Ohrid, Winery Popov in Sopot, Winery Skovin in Skopje, Winery Stobi in Gradsko, Winery Tristo in Veles, Winery Trajkovski in Negotino, Winery Valandovo in Valandovo, Winery Vardarska Dolina in Negotino, Winery Venec in Dolni Disan, Winery VVM GD in Kavadarci.

North Macedonian wineries may usually be frequented until late afternoon, that is 4–6 p.m. Sometimes they are also open for a longer period of time.

Among the 28 analysed wineries, 25% of them feature on-site restaurants. The menu usually includes not only international dishes, but also a few national/regional ones. There are also certain restaurants that offer organisation of various events, such as weddings, birthdays, and New Year celebrations.

Furthermore, half of the wine cellars (14) offer their visitors a chance to taste the wines, as well as to order them in the on-site restaurant. In turn, eleven of said wineries have a specially prepared room for wine tasting purposes (tasting room). Five of them (18%) own a shop near the winery or in a large city, and sell their own wines there. Then again, buying the wine on-site may be possible in many other wineries as well.

Only four wineries provide the tourists with an opportunity to walk around the vineyard located nearby. Eight wineries offer winery tours or extended tour options.

The smallest group constitutes the wine centres featuring accommodation facilities – only 10% of them have them in their offer.

Founded in 1885 in the village of Kavadarci, Tikveš is the most popular winery in the country (Fig. 3 A, B, and C). It is open from Monday to Friday between 8 a.m. and 4 p.m. Visiting the winery with a guide, tasting the wine, as well as the possibility of eating at the restaurant require prior booking. Visitors interested only in buying wine may do so in the store in front of the facility's main gate. Tikveš is North Macedonia's market leader when it comes to both wine sales and export. Nearly 50% of their bottled wine is exported to the USA and UK. One should also bear in mind that the Tikveš portfolio encompasses over 50 disparate wines. This winery is processing not only local varieties of grapes, such as Temjanika, Vranec, and Smederevka, but also international ones, namely Merlot, Cabernet Sauvignon, Chardonnay, and Rkaciteli (Winery Tikveš in Kavadarci: <https://tikves.com.mk/en>).

Another winery that is worth mentioning is Popova Kula (Fig. 3 I and J) – it is so far the best facility of such nature in terms of enotourism. Located in the town of Demir Kapija, 20 km south of Kavadarci (Stamatoski, 2015), said

winery was established in 2004. Four years later, it expanded its activity by opening its own restaurant. It works from Monday to Friday between 8 a.m. and 5 p.m., and offers accommodation on booking.com. As such, the facility features 33 rooms in various configurations and prices, as well as a dining room with a capacity for up to 60 people that can be booked for private parties. As for the restaurant itself, it serves traditional Macedonian and international cuisine. In addition, the winery produces wines from 11 different vine varieties, one of which is Stanushina – a local grapevine that is processed exclusively by Popova Kula. Its website is run in three languages: Macedonian, English and Polish (Winery Popova Kula in Demir Kapija: <http://www.popovakula.com.mk/>). Not only does the winery have a representative office in Poland, but also its President of the Board, i.e. Grigori Popovski, is of Polish descent (Stamatoski, 2015).

Founded in 1928, Royal Winery Queen Maria (Fig. 3 G) constitutes another very well-developed winery as far as enotourism is concerned. Just as Popova Kula, it is situated in the town of Demir Kapija, and offers both accommodation and catering facilities. The premises of the winery are suitable for walking tours through the vineyards surrounding it. If need be, the visitors may book an apartment (e.g. on booking.com), a table in the restaurant, or even arrange a tour around the vineyard. As for the wines, they are produced from the following varieties: Cabernet Sauvignon (red), Chardonnay (white), as well as Cabernet Sauvignon and Merlot (pink). In fact, Queen Maria is the only wine centre in North Macedonia to produce blue wine (Blue Sapphire), which is made from the Chardonnay strain (Royal Winery Queen Maria in Demir Kapija: <https://wineryqueenmaria.com>).

Among the wineries of North Macedonia one can also find the Chateau Kamnik Winery. The building in which it is located is surrounded by vineyards and resembles a small castle. Established in 2004 in Skopje – the capital of this Balkan country – it overlooks the valley of the Vardar river. Said winery provides its visitors with accommodation, catering, as well as tours. This is also yet another facility that offers rooms via booking.com. Its wine stores can be found in several locations in the very capital. What is more, the guided tours include a tour



Figure 3. North Macedonia’s wineries and vineyards: A, B, and C – Tikveš winery; D, E – Popov; F, H – Bovin Winery; G – Queen Maria; I, J – Popova Kula (Photos A–C by P. Charzyński; D–J by S. Kwietniewska)

around the vineyard, wine cellars, and wine tasting, usually concluded by either lunch or dinner in the winery’s own restaurant (Winery Chateau Kamnik near Skopje: <https://www.chateaukamnik.com>).

The other remaining wineries, such as Bovin (Fig. 3 F and H), Popov (Fig. 3 D and E), and Stobi focus more on wine production rather than on enotourism. Apart from visiting wineries as such, North Macedonia has a limited range of attractions for the wine-interested tourists: they may at most visit the Kavadarci Museum, follow the wine routes, or participate in music festivals promoting winemaking.

The Kavadarci Museum is part of a cross-border cooperation established between Kavadarci

and the city of Edessa in Greece. Said museum, the first of its kind in North Macedonia, displays items related to food production and processing, among which one may find drinking vessels and wine-making equipment. What is more, the visitors may become acquainted with how to process and prepare foods made from wheat, barley, and grapes. They are also given an opportunity to learn the history behind the preparation of traditional dishes dating back to the Neolithic period, through the antiquity, the Byzantine period, and into the times of the Ottomans. The most interesting exhibition, however, is located in the basement – there are exhibits from the very first Tikveš winery (Kamcewski et al., 2011).

Tikveški Grozdober is a three-day-long festival that promotes winemaking in North Macedonia. It has been held annually in the middle of September since the year 1964. The time of the event is associated with the start of the grape harvest (<https://kavadarci.gov.mk/>). In 2019, only 4 hours were allocated for the presentations and wine tastings organised by the exhibiting wineries, that is Stobi, Tikveš, and VVM GD Tikveš (working independently since 1999). At the same time, the festival's poster featured information that there was an additional presentation regarding the process of harvesting and creation of wine that would be held nearby. The rest of the programme revolved around music concerts of various regional bands, including a famous Balkan artist – Zdravko Colic.

Among the local customs in the Tikveš sub-region one may stumble upon the St. Trifun's

Day, which is celebrated mainly by winery owners on February 14. On this day, at least one strain is pruned and doused with red wine and rakija. The celebration itself, however, does not stop there since it also includes singing and drinking various beverages afterwards (Larrachea, 2009).

Finally, the last aspect that should be noted is contractual wine routes – there are two of them in North Macedonia. The first one runs from North to South, starting in the capital city, going near the archaeological site of Stobi, and ending 170 km farther in the town of Gevgelija at the Greek border (Stamatoski, 2015). As for the other wine route, it stretches from East to West. The starting point is in the village of Stip, and it runs 30 km through the area of former Yugoslavian plantations to the town of Kochani (Stamatoski, 2015).

5. Assessment of enotourism in North Macedonia – survey results

The research aimed to outline a socio-demographic profile of the enotourists coming to this country, describe their enotouristic experience, as well as show the country's potential for enotourism development. The target population was enotourists in particular.

The surveys were conducted from May to September 2019 first in the city of Ohrid, where several of them were filled by Macedonian residents, and then during the Tikveski Grozdober festival among its random participants. The questionnaires were prepared in three languages: Polish, English, and Macedonian. All three contained the same 14 questions, 6 of which were demographic-oriented, and

the remaining 8 related to the research area's enotourism issues specifically.

A total of 132 people took part in the survey. The results were divided into two groups, one of them being based on the answers given by the North Macedonia residents, and the other by its foreign visitors. The number of participants in these groups is similar: Macedonians filled 67 questionnaires, whereas the tourists completed 65 of them. Men were predominant in the total number of respondents (59%). As can be seen, the largest number of respondents was at ages 36–45, and the second largest group was constituted by the respondents above age 60 (Fig. 4).

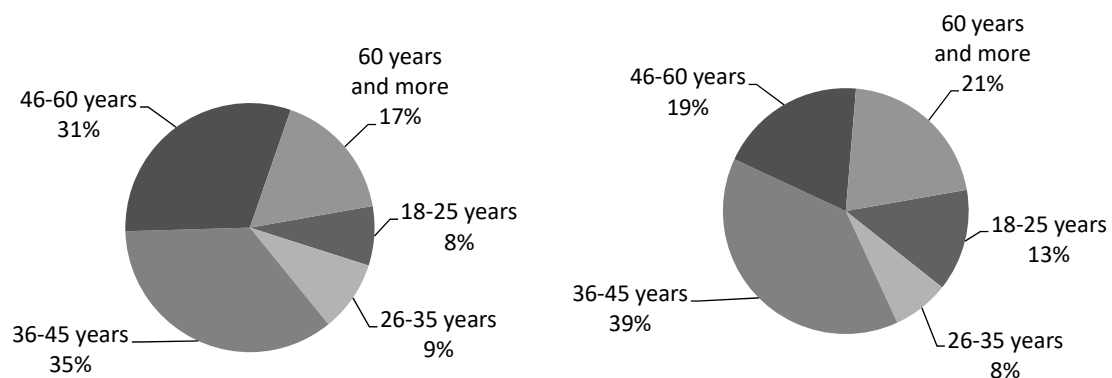


Figure 4. Age of respondents (left – foreigners, n=65; right – Macedonians, n=67) (based on Author's own study)

Compared to the foreign tourists (90%), the education level of North Macedonia residents who participated in survey was considerably lower – only 53% of them had a higher education degree (Fig. 5).

(9%). Among the foreigners, the largest group comprised Poles (21%), followed by the Turks (7%), Serbs (5%), and Albanians (5%).

The most common marital status of respondents was married. It should also be mentioned

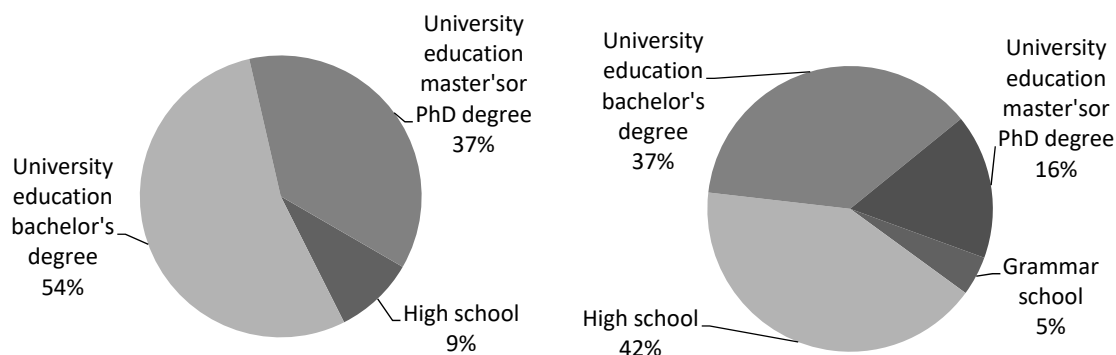


Figure 5. Education of the respondents (left – foreigners n=65; right – Macedonians n=67) (based on Author's own study)

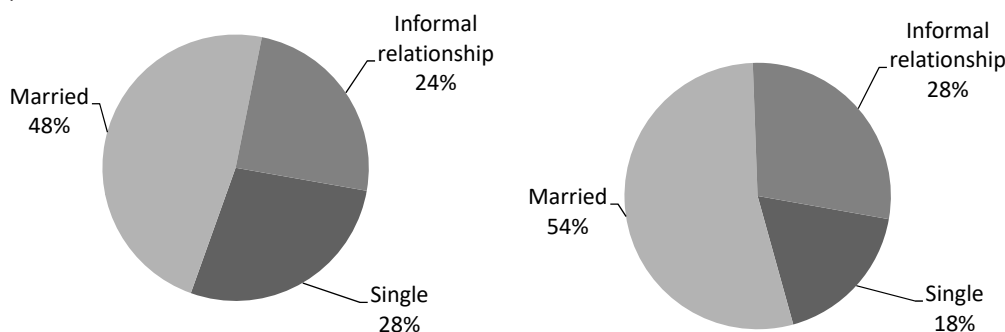


Figure 6. What is your marital status? (left – foreigners n=65; right – Macedonians n=67) (based on the Author's own study)

It so transpires that most Macedonians came from the central part of the country (e.g. Kavadarci, Negotino, Demir Kapija, Prilep), then from the Western part (Ohrid, Struga), and a few people were from the capital itself

that singles prevailed in the group of tourists (Fig. 6). Both Macedonians and foreigners travel most often with their families. In addition, the latter often indicated that they travel with friends or partners as well (Fig. 7).

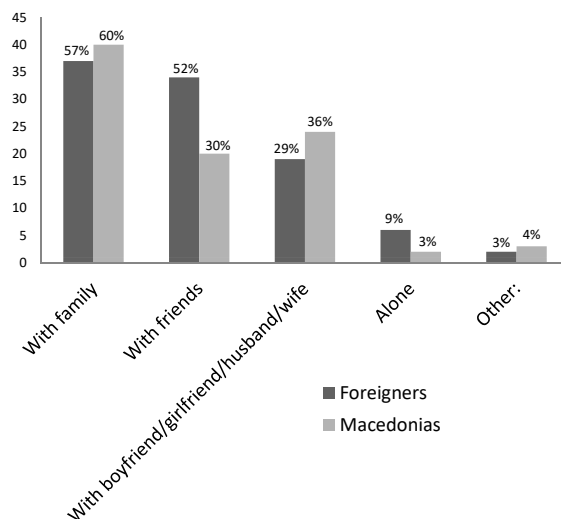


Figure 7. With whom you usually travel? (left – foreigners n=65; right – Macedonians n=67, respondents could choose more than one answer to this question) (based on Author's own study)

The questions in the second, main part of the survey referred to enotourism as such. The respondents were asked to explain the concept of wine tourism. Only 65 of them (28 Macedonians and 37 foreigners) answered that they knew what wine tourism was and they were able to describe it. The most common answer regarding the term itself in both groups was wine tasting and visiting wineries.

The survey also sought to learn wine customs around the world. When asked about the frequency of drinking wine, most foreigners declared consumption once a month (38%) or even once a week (25%). Macedonians usually answered less than once a month (39%) and once a month (Fig. 8).

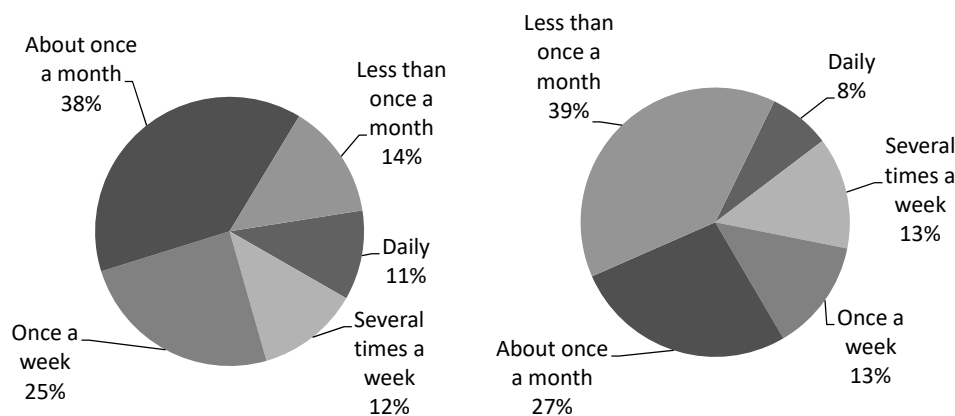


Figure 8. How often do you drink wine? (left – foreigners n=65; right – Macedonians n=67) (based on Author's own study)

The next question concerned foreign tourists only. They were asked if they had tasted Macedonian wine before coming to North Macedonia. Should the answer be affirmative, the respondents were asked to provide an example. Thirty-four percent of them could recall certain names. It was often the case that the names of wineries were mentioned, without providing specific wines, for instance Tikveš, Stobi, Popova Kula, or Bovin. Then again, the respondents would sometimes name numerous wines, the majority of which were of the red variety, i.e. T'Ga Za Jug, Vranec (from Tikveš, Popova Kula). Several white wines, such as Temjanika and Traminac were also found among the answers, along with the name Alexandria, under which a line of various wines is sold.

Out of 132 respondents, only 48 (36%) had been to a place associated with wines before. As

an illustration, the answers were rather varied, but Tuscany (Italy), Porto (Portugal), La Rioja (Spain), and Champagne (France) were the most prevalent ones.

The main factors rendering enotourism interesting for foreigners are the possibility of wine tasting (76%), sightseeing / learning about the culture of the region (66%), as well as relaxation (62%, more than one answer could be marked). The other factors, such as learning about wine production, winemaking tradition, and viticulture were also of great importance for a considerable number of respondents (61%).

Furthermore, foreign tourists often indicated that their main source of knowledge on

wine tourism was the Internet (52%). Ten percent of them learned about it from their friends or family, and only 3% used newspapers, radio or television for this purpose. Macedonians indicated similar sources of information.

Out of the total number of respondents, only 61 could give the name of at least one winery in North Macedonia. More than half of them (54%) were unable to do so. The respondents who answered yes to the afore-mentioned question referred to a total of 101 wineries, among which Tikveš was the most frequent answer, followed by Popova Kula, Stobi, Ohrid, Dalvin, Queen Maria, Chateau Kamnik, Bovin, Skovin, as well as Bela Voda.

The very last question pertained to wine festivals in North Macedonia. Only 23 in 132 of the surveyed (17%) could name a few events, for instance Tikveški Grozdoobar (Fig. 9) and Skopje Wine Expo.



Figure 9. Tikveški Grozdozar 2019, wineries exhibiting stands (Photo by S. Kwietniewska)

6. Summary and conclusions

North Macedonia is a small country located in the middle of the Balkan Peninsula, a relatively little-known tourism destination. Literature shows that the country has a considerably long winemaking history. However, due to its peripheral location, turbulent history, and underdevelopment, its potential is still marginally exploited. What is more, despite its rich culinary tradition evolving throughout its extensive history, North Macedonia is not at all a wine country in terms of culinary culture.

The most often frequented part of the country is where the Ohrid Lake is located. The accommodation and catering facilities in this

area are the best developed compared to the other ones in this Balkan republic, but it does not offer many enotourism opportunities.

As for North Macedonia's most important wine region, it is located in its central part, which can be reached by the main expressway running from North to South of the country. The region itself is poorly marked and leads only to the prime wineries in the area, but there are many more of them here that can be visited. What is more, the accommodation infrastructure is underdeveloped and of low quality, and the wine routes mentioned before are charted, but exist only in theory. In fact, there is no entity

that would coordinate any enotourism activity along their course. The Tikveški Grozdober festival, in turn, revolves mainly around music shows and entertainment for local residents; wine promotion is of lesser gravity.

The results of the survey clearly show the respondents' keen interest in wine. Even though most of them were not familiar with the concept of enotourism, they could sometimes name the wineries they have visited and the wines they have tried. The wine festival did not attract only people who take interest in wine, but also the ones keen on concerts and entertainment in general. This may be the reason why so many festival participants were not interested in enotourism. Half of them came to the festival because they genuinely wanted to take part in wine-related activities, and the other half enjoyed it for other reasons. This theory can be supported by the data on wine consumption, where Macedonia ranked 34th in the year 2019 (Wines consumption ranking: <https://www.nationmaster.com/nmx/ranking/wine-consumption-per-capita>).

It emerges from the survey that foreign tourists drink wine more frequently than Macedonians. It can thus be assumed that foreigners who arrived in Kavadarci are wine tourists in

the strict sense of the word – they deliberately chose the destination and time of visit to take advantage of the enotourism offer.

There are only a few vineyards that offer enotourism activities. In North Macedonia, more than half of them are family businesses. Their main focus is wine production and sales, yet it must be mentioned there are certain vineyards which already have or develop their own enotourism facilities, but they are not yet able to promote them properly. It so appears that the Balkan republic in question needs an organisation whose goal would be to promote wine tourism in the country, as well as its branding. Moreover, it should aim to develop cooperation among the wineries to render wine tourism one of the drivers of tourism growth, and attract more tourists to the wine regions of North Macedonia in general. As such, North Macedonia is a country where wine tourism began to spread relatively recently and is still at the initial stage of its development. One should also bear in mind that further facilitation of wine production and enotourism could be possible if the national authorities undertook efforts in terms of legislation, e.g. by introducing systems of wine classification and appellation, and by establishing a protected geographical indication.

Acknowledgments

We would like to thank Prof. Zoran Tuntev, who is currently teaching at the Bitola University at the Faculty of Tourism and Hospitality in Ohrid. He helped us gather all the essen-

tial information about North Macedonia. We would also like to show our gratitude to Dr Czesław Adamiak for his valuable comments on the earlier version of the manuscript.

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