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INSIGHTS OF ROMANIAN WINE PRODUCERS' BUSINESS AND THEIR INVOLVEMENT IN WINE TOURISM

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Abstract

The aim of this research paper is to explore the business framework of the Romanian wine making sector. In the analysis were considered factors that have an influence on the performance of the legal entities such as the professionals working in the sector, winery profile, the dimension of the vineyards holding etc. The research was conducted using the survey method divided in three sections, first was to point out the profile of the winery's employees, while the second part reveals data regarding the winery and organization. Finally, the third part is focused on the wine tourism activities that are performed within the wine cellar. The results of this study were analysed with the cross tabulation method for nominal variables that showed the dependence between winery type and dimension of the vineyards holdings. Moreover, the wineries perspective has been investigated in regard to the main reasons that encourage them to expand the wine making business to wine tourism. Finally, in the last part of the analysis the reasons that restrain the producers from expanding their wine making business to wine tourism were revealed.

Key words: *wine tourism, wine tourism turnover, wine producers' business, wine tourism activities*

INTRODUCTION

In many regions wine producers do not see themselves as part of tourism sector.

Often due to the fact that producers do not have the openness to see the opportunity to converge the wine sector with tourism and the synergy is set to failure [15].

The key success is that wine producers should understand tourism as a product that can be offered at the winery and its benefits. Also, [9] reinforces the need for wine producers to understand the tourism sector and how it can be integrated in their business, but at the same time tourism operators lack in understanding winemaking industry and viticulture [11]. The added value of wine tourism for the viticulture sector is unquestionable. Customer and market knowledge are two of the many factors that wine producers should be focused on learning when deciding to expand their business and open their winery doors to the visitors, whereas further the stages of development should be based on cooperation between the sector stakeholders and planning for the future.

The economic benefits of the association between wine industry and tourism are generally recognized [14] for instance increased winery sales [18], work places creation [16] and wages for the community [24], easier access to associations with the purpose of creating a common image and publicity for the specific region where all the interested parties from the area can benefit [17].

However, on the other side there are also challenges that the industries are needed to face such as lack of information and research in this domain, lack of experience and skills, staff training, lack of infrastructure, costs increase etc. [9].

The fore mentioned challenges might be overcome through a formation of a collective identity that can define the region [23], development of wine tourism related products such as considering the local cultural and agricultural resources [6], combining wine tourism with art [22] or gastronomy and wine routes development [7].

Promotion and effective marketing strategies are important factors that are influencing the success of both tourism sector and wine sector. In general wine tourism is often associated as being part of agrotourism, rural tourism, ecotourism, gastronomic tourism [21], reinforcing what was mentioned above where one of the success factors of developing wine tourism is to be associated with something or as being part of something. In this case association of tourism and viticulture sector should be advertised with effective marketing strategies and to create a branding image of the whole wine region in order to create awareness and to promote the unique features of the area [4].

When it comes to marketing and promotion the most used tools are social media, online platforms, partnerships or the winery website.

Additionally, the experiences that wine tourists have at the winery are fundamental [2] facilities, tasting experiences, entertainment activities, information provided may significantly impact tourists' satisfaction. Also, the accommodation options, restaurants, transportation and overall touristic infrastructure are critical for the development of the wine tourism services. [3] present in their paper the main factors that influence wine region destination image, as follows: wine product and consumption experience, general winescape features, entertainment and events, natural environment and rural landscape, relaxation and recreation, customer service, socializing and wine clubs and other tourism and hospitality services. These factors are a consolidation from different papers related to wine tourism that focus on the development of this tourism type. Some of these factors are also mentioned by other authors as [10], where they represent elementary attributes for the development of a winery business. Thus, based on research literature the data should be relevant and integrated as a business plan for the development of Romanian wine cellars activity.

Romanian wine tourism has become popular in recent years, as the country has a rich history of winemaking and viticulture. In terms of wine production, Romania ranks as 14th worldwide [13]. Furthermore, Romania also has significant vineyard surface meaning that it has a great potential for wine tourism development [12].

With reference to the wine regions there are seven regions that are spread across country, and classified as areas with Designation of Origin (DOC) and regions with geographical indication (IG). Moreover, Romania has the advantage of being recognized for its indigenous grape variety such as Tamâioasă românească, Busuioacă de Bohotin, Negru de Dragășani, or Fetească Regală are only a few from a diverse variety [19].

When it comes to wine tourism infrastructure there are more than 400 legal entities that produce wine [26], while part of the wineries have the proper facilities for wine tourism services.

The main objective of the paper is to gather data and information regarding the current state of the wine and tourism market representing an incipient study from wineries point of view. The paper is structured as follows: in the first section data about the wineries representative are revealed in order to see who the professionals working in this field are. The second section of the study presents the profile of the wineries and business insights, while in the third section wine tourism activities performed at the wineries are exposed. Therefore, the following analysis is an overview focused on Romanian wineries engagement in wine tourism activities.

MATERIALS AND METHODS

The research was designed to show an overview of the Romanian wine business and where it stands in terms of the development of wine tourism. Thus, in the first stage the data was collected on site during the annual spring wine festivals from Bucharest, Revino and RO-Wine in May 2023. The discussion with the wineries started with a presentation of the wines, while afterwards they were asked if they are offering wine tourism services at the wine cellar, and the discussion transited to introducing the purpose of the study and if they are willing to participate. The overall interest in participating to the study was low, only few wineries accepted to fill the survey

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on spot, while others were requesting the survey via e-mail, and some were not willing to participate at all. Considering the low-rate of responses received, other wineries that were not participating at the two festivals were contacted via e-mail in the month of June and the survey remained open until the end of the month.

In total 63 wineries were invited to participate to the study, where only 19 have filled the survey.

The responses were analysed using the SPSS statistical package, cross tabulation method and Microsoft Excel for the design of the graphs.

The survey had an introductory part where data about the winery representative was collected,

while the second part was focused on collecting data about the business activities and the perspective in respect to the wine tourism.

RESULTS AND DISCUSSIONS

The total response rate was 30.2%, if compared with other studies related to wine tourism, the response rate is below the general average that is around 40%. However, considering that the period for collecting the data was limited only to a series of events the response rate might be considered acceptable.

In the first stage of the survey a profile of the wineries representatives was designed. The people working in this sector are young professionals, between the range of 31 – 40 years old (31.6%) and 41 – 50 years old (31.6%).This confirms findings of other research made by Australian Government (2021) that state wine makers average age is 35 to 44 years old. The younger generation - the group below 30 years old consisted of 21.1% and the rest are above 50 years old (15.8%). Surprising or not there are more women (52.6%) than men (47.4%) working in the field. In reference to their assignments at the winery, the roles are various and not significantly different between genders. For instance, there are both male and females that are winey owner, administrator, oenologist, sales representative or working in the marketing department. Other roles that they have are event managers, operations manager or sommelier, these jobs are mentioned on [25] official website in the career paths section from wine industry sector.

In regards to the experience, most of the respondents are working in the viticulture and wine business for more than 7 years (47.4%), while 42.1% have between 1-7 years' experience, and 10.5% are new comers in the field. In the next part of the survey, the respondents were asked about the winery attributes in order to have a clear profile of the wineries included in this study.

In Figure 1 it can be seen that the wineries are located across country coming from 5 out of 7 wine regions of Romania. Also, taking into consideration that the wine festivals were held in Bucharest it can be explained why most of the wineries are coming from Muntenia and Oltenia, that this region has the advantage of being in the proximity of the country capital.

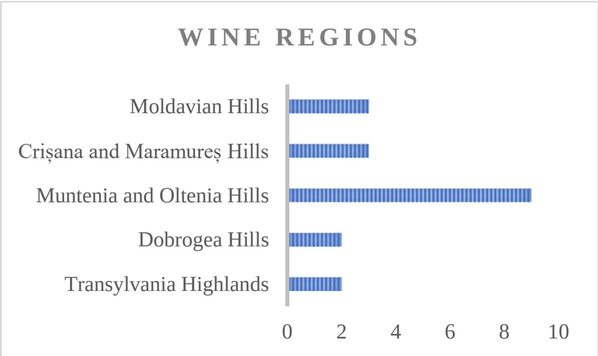

Fig. 1. Representation of the wine regions participating in the study
Source: Result of survey, 2023.

Couple with the location, it is equally important to show when the wineries started their activity in the wine business. As is known the Romanian wine making industry has been impacted by the communism period where state-owned wineries were returned to the initial owners after 1989 [1]. Thus, only few wineries re-entered the business after that period, whereas it is revealed in this study that the majority 52.6% have started their wine making business only after the year of 2000. It is important to mention that 15.8% are wineries established in the last couple of years (after 2015).

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When it comes to the structure of a wine making business there are two options, one is that the winery is growing their own grapes, handle all the stages of the grape cultivation and finally produce the wine; or only produce wine with grapes coming from outside sources. In this specific study 21.1% of the respondents are only wine producers, meaning that they have external resources for the grapes, whereas the rest are growing grapes on their own vineyards for the wine production.

Eurostat (2024) [8] has made an analysis where it shows the overall vineyard holdings in Europe, this study is positioning Romania as first one, although in referralto average area of vineyards it is the last one (0.2 ha per vineyard holding).

However, in this research in terms of vine holding, the wineries that were included in the study own around 51-100 ha of vine (40.0%), while 13.3% have more than 500 ha and the rest less than 50 ha of vine (Figure 2). Correspondingly that Romania has a large dimension of cultivated vine, the dimension of the winery holdings is significant.

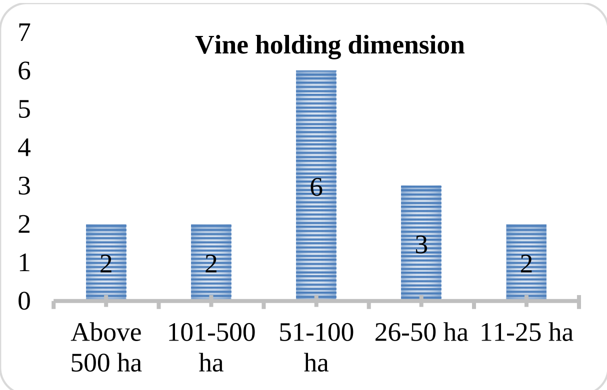

Fig. 2. Vine holding dimension
Source: Result of survey, 2023.

Before going further with the results a cross tabulation analysis was performed for a deeper understanding of the collected data.

In Table 1 it can be seen that within the wine makers that grow their own grapes the dimension of vine holding varies, for instance there are only 13.3% that have 11 – 25 ha or 101 – 500 ha, while the majority holds between 51 – 100 ha (40.0%). On the opposite side, the wine makers that detain more than 500 ha are only 10.5%.

For the wine producers that buy the grapes to produce wine 50% of them mentioned that they purchase around 26 – 50 ha. At the same time, 25% of them are buying grapes for even bigger productions such as more than 100 ha, or even more than 500 ha depending on the producing capacity.

Furthermore, a Pearson Chi-Square Test was performed in order to see if there is a statistical significance between the two variables. Considering that the p-value (Asymptotic Significance) is less than 0.05, this result is statistically significant, meaning that the relationship between the winery type and dimension of vine holdings is considerable.

In addition to the overview of the wine makers business details that were revealed, the respondents were asked if they had available any wine tourism services at their winery. 94.7% of the wine cellars that responded to the survey answered affirmatively and confirmed the availability of wine tourism activities and facilities at their property.

In regard to the type of services that are offered, the experiences mentioned by [2] in his study are also found in the Romanian wineries offer. However, depending on each winery the facilities and infrastructure available varies. As Figure 3 shows wine tasting and winery tour are the main activities that are performed by all the analysed wineries, while 38.9% of them are offering only these two services at the moment and 11.1% only wine tasting. On the other side, some of the respondents confirmed that they had available at the winey full services, including accommodation and restaurant and other entertainment activities or even sports facilities. Despite that, 16.7% of them have full services and 5.6% have full services and extra leisure activities. Compared with the study of [20] that was made on case of wineries from Slovakia on the wine tourism activities available at the wine cellar, it seems that overall,39% of them carry at least one wine tourism activity which is similar with our case, while there are around 17% of the wineries that provide three up to five activities.

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Fig. 3. Wine tourism services
Source: Result of survey, 2023.

Table 1. Winery type * Dimension of vine holding Cross tabulation

			Dimension of vine holding						
			0	101-500 ha	11-25 ha	26-50 ha	51-100 ha	Over 500 ha	Total
Winery type	Wine producer	Count	4	0	0	0	0	0	4
		% within Winery type	100.0 %	.0%	.0%	.0%	.0%	.0%	100.0%
		% within Dimension of vine holding	100.0 %	.0%	.0%	.0%	.0%	.0%	21.1%
		% of Total	21.1%	.0%	.0%	.0%	.0%	.0%	21.1%
	Wine producer and vine farmer	Count	0	2	2	3	6	2	15
		% within Winery type	.0%	13.3%	13.3%	20.0%	40.0%	13.3%	100.0%
		% within Dimension of vine holding	.0%	100.0%	100.0%	100.0%	100.0%	100.0%	78.9%
		% of Total	.0%	10.5%	10.5%	15.8%	31.6%	10.5%	78.9%
Total		Count	4	2	2	3	6	2	19
		% within Winery type	21.1%	10.5%	10.5%	15.8%	31.6%	10.5%	100.0%
		% within Dimension of vine holding	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
		% of Total	21.1%	10.5%	10.5%	15.8%	31.6%	10.5%	100.0%

Source: Authors' own research, 2023.

Table 2. Pearson's chi-squared test Winery type* Dimension of vine holding

Chi-Square Tests			
	Value	df	Asymp. Sig. (2sided)
Pearson Chi-Square	19.000	5	002
Likelihood Ratio	19.557	5	002
N of Valid Cases	19		

Source: Authors' own research, 2023.

Additionally, the wine cellars representatives were asked how long they had been offering wine tourism services.

Figure 4 confirms the statement from other studies that say wine tourism is a relatively new practice in Romania. 38.9% expanded their wine making business to wine tourism in the last 3 years, while the rest have more than three years' experience on performing this type of tourism.

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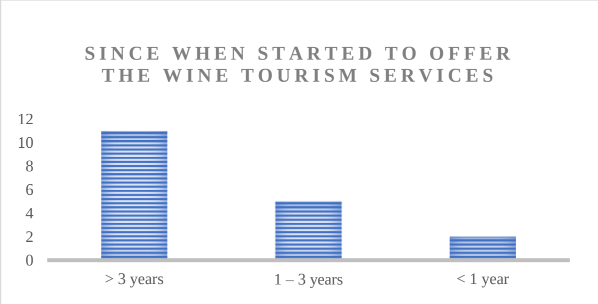

Fig. 4. Wine tourism services
Source: Result of survey, 2023.

If it is to compare the time since the wineries started to perform wine tourism with the services that they offer, there is indeed a wider offer at the wineries that have more than 3 years' experience in this sector; whereas the wineries that are in the incipient phase of development of wine tourism services, they are currently limited to wine tastings and winery tours.

The number of tourists that are visiting a winery is a key success factor that counts when it comes to tourism. Thus, based on the received responses 44.4% welcome at their winery less than 1,000 people, while 38.9% between 1,000 – 5,000 people. The rest of the wineries that stated they received more than 5,000 guests per year at the winery are located in the wine region of Moldova and Dobrogea, and they have been offering wine tourism services for more than 3 years (Figure 5). Also, these wineries have available only wine tasting and winery tours as activities, where the main facility is the restaurant, that explains the high number of visitors compared with the other wineries.

Fig. 5. Average number of tourists per year
Source: Result of survey, 2023.

Turnover is another key performance indicator when it comes to a business and its profitability. Overall, in case of the Romanian wineries 66.7% states that the turnover from wine tourism is less than 5% (Fig. 6).

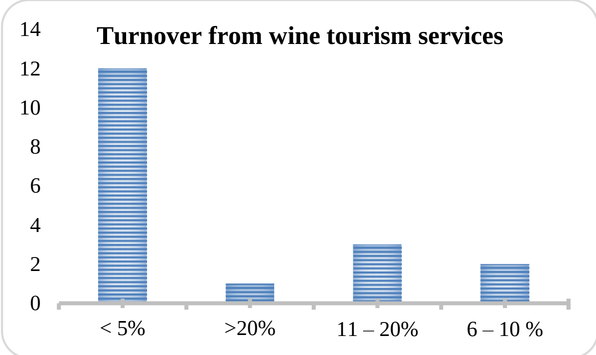

Fig. 6 % turnover of the wineries that comes from tourism services
Source: Result of survey, 2023.

Table 3. Pearson's chi-squared test Average number of tourists*Turnover from wine tourism services

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.375	6	.761
Likelihood Ratio	4.495	6	.610
N of Valid Cases	18		

Source: Authors' own research, 2023.

On top of this, within wineries that receive 1,000 – 5,000 people per year as Table 3 shows, the average turnover from wine tourism services is less than 5%, and for 11.1% of wineries that receive less than 1,000 people per year, the total turnover is on average between 11 -20%.This reveals that wine tourism might not have a significant impact when it comes to the financials of the winery, but it might help to overcome slow sales periods. On the other side, similar research to compare this data with other countries was not found at the time of the study.

The Pearson Chi-Square test p-value is greater than 0.05 significance level, meaning that there is not a statistically significant relationship between the number of tourists per year and the turnover that comes from wine tourism services. If the dimension of the winery or the activities available are taken into consideration, the relationship between the variables is still not statistically

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significant. Average number of tourists and turnover from wine tourism cross tabulation are presented in Table 4.

Table 4. Average number of tourists * Turnover from wine tourism services Cross tabulation

			Turnover from wine tourism services				
			< 5%	>20%	11 – 20%	6 – 10 %	Total
Average number of tourists	< 1,000 persons	Count	4	1	2	1	8
		% within Average number of tourists	50.0%	12.5%	25.0%	12.5%	100.0%
		% within Turnover from wine tourism services	33.3%	100.0%	66.7%	50.0%	44.4%
		% of Total	22.2%	5.6%	11.1%	5.6%	44.4%
	>5,000 persons	Count	3	0	0	0	3
		% within Average number of tourists	100.0%	.0%	.0%	.0%	100.0%
		% within Turnover from wine tourism services	25.0%	.0%	.0%	.0%	16.7%
		% of Total	16.7%	.0%	.0%	.0%	16.7%
	1,000 – 5,000	Count	5	0	1	1	7
		% within Average number of tourists	71.4%	.0%	14.3%	14.3%	100.0%
		% within	41.7%	.0%	33.3%	50.0%	38.9%
		% of Total	27.8%	.0%	5.6%	5.6%	38.9%
TOTAL		Count	12	1	3	2	18
		% within Average number of tourists	66.7%	5.6%	16.7%	11.1%	100.0%
		% within Turnover from wine tourism services	100.0%	100.0%	100.0%	100.0%	100.0%
		% of Total	66.7%	5.6%	16.7%	11.1%	100.0%

Source: Authors' own research, 2023.

In addition to the numerical data that was provided by the respondents, other factors were considered when discussing business insights, therefore they were asked which were the preferred approaches when it comes to marketing and promotion. The responses received were in majority the same, as follows:

Winery website, social media platforms, such as Facebook, Instagram, Tik-Tok; as well as the presence on the online booking platforms (Booking, Airbnb, Agoda etc. – only for the ones that have accommodation) or TV commercials and press.

Moreover, the perspective of the wine cellars was requested in question to which are the main reasons for expanding their wine making business to tourism. Afterwards, based on the chosen options an average of the answers was made and the identified reasons were placed in their order of importance as it turned out from the survey.

The below results are sustained by [14] study from the Stellenbosch wine routes where the management of the wineries was asked about the perspective regarding wine tourism at their wine cellars. The results obtained in the current study are similar. Therefore, the below sumsup wine tourism advantages that

Romanian wineries representatives identified as follows:
-Wine tourism contributes to better advertising of the wine/wine cellar – 88.2%
-Wine tourism has a positive impact on wine sales – 82.4%
-Wine tourism is an opportunity to educate customers – 70.6%
-Wine tourism fosters loyalty to the winery's wines – 47.1%
-Visitors buy larger quantities of wine directly from the winery – 35.3%
-Wine tourism is an opportunity to test new products (wine) – 29.4%
-Wine tourism helps me differentiate myself from my competitors – 23.5%
-Wine tourism helps overcome periods when wine demand is low – 17.6%
Extra comments provided by the wineries: *wine tourism promotes the wine region and the landscapes together with local wines and it keeps the traditions alive.*
On the other hand, on the subject of the reasoning why wine makers are reluctant to be involved in wine tourism, they consider the involvement in this type of activity too challenging. [20] state that the wineries are seeing wine tourism not so beneficial when it comes to incomes as it requires high investments, or as per [5] wine producers get stuck into development of the proper facilities for wine tourism. On the current analysis, the respondents agreed on the below statements:
-Wine tourism requires high capital investment – 50%
-There is not enough labour for wine tourism – 30%
-Lack of support and development programs for this type of tourism – 30%
-Wine tourism increases the cost of maintaining the winery – 20%
-I am not interested – 20%
-Lack or low demand for wine tourism services – 10%

CONCLUSIONS

Romanian wineries business is currently in a stage of progress and development when it comes to wine tourism integration. Even though, the relationship between wine sector and tourism has demonstrated it is beneficial for both parties, there are still efforts needed for a better synergy.
In the first stage, the structure of the winery is significantly important not only in terms of dimension, but as well as regards the variety of wine tourism infrastructure and facilities available. Overall, 94.7% of interviewed wineries are offering wine tourism services, to note that the wineries established starting with 2010 are offering more facilities and services than the ones established after the communism period. Also, it might be discussed the wine producers that hold the vines and that have the vineyards in the proximity of the wine cellar are receiving more tourists (more than 1,000 people per year) compared with the ones that only have wine producing facilities. This could be explained by the fact that tourists are looking for a complete experience, meaning to see the winemaking process, but also to enjoy the winescape and to walk among the vines during the same visit.
At the moment, in general the wine tourism offer is limited, and this is proven by the turnover percentage of wine tourism (less than 5%) from the total wine making business. Concerning the number of tourists, the study reveals the importance of having a restaurant on the winery property; as showed the wine cellars with restaurants receive more than 5,000 persons per year.
On the other side, the alleged dependency between the number of tourists per year and turnover percentage from wine tourism services that consisted in a non-significantly might be motivated by the fact that only few wineries have restaurants on the property. Thus, this means that people are more likely to visit the place for the restaurant, not to visit the winery.
Finally, with respect to the pros and cons for wine tourism activities at the winery, the received responses acknowledge the importance of implementing such type of facilities and activities, for instance increased and direct wine sales, brand awareness and gaining customers loyalty, while the main disadvantage is the high costs of investments needed.

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