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The thesis title

**THE EMERGENCE OF ENOTOURISM IN
AN EASTERN EUROPEAN AREA:
THE REPUBLIC OF MOLDOVA**

Abstract

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Tourism is a very important social and economic phenomenon of the contemporary society. Nowadays it became a necessary consumer product and an important coordinate of quality of life, while enotourism is a developing tourism, its demand is increasing but remains still low compared with other types of tourism. The development of demand for this type of tourism seems to be explained by the growing popularity among consumers of culturally oriented activities: holidays become an opportunity to train, develop knowledge in several areas. Heritage, whether tangible (architecture ...) or intangible (customs, traditions ...) has an increasingly important role in choosing destinations and tourism activities (Bliodon B., 2003). Moreover, the growing interest of tourists regarding the wine world can be explained by the tendency of searching for authenticity. For example, the consumption of local products is increasing among tourists since these traditional products are a guarantee of quality and carry with them the culture and history of the region visited (Bliodon B., 2003).

The Republic of Moldova has an important wine-producing potential which could be successfully applied in attracting foreign tourists.

This research focuses on the study of enotouristic phenomenon in Eastern European region. The choice of the area between Prut and Dniester is motivated by the importance of wine-producing potential in the Republic of Moldova, both from the point of view of history, tradition and culture, and in economic terms, for the development of the tourism sector. The study presents the emergence of enotourism in Moldova and new areas and opportunities for its development, which include:

- the experience of major wine-producing countries in the world;
- spatial distribution of enotouristic activities and facilities;
- tourists' motivation in coming to visit enotouristic destinations;
- the structure of enotouristic experience;
- the vinegrowers/ winemakers' opinion on enotourism development;
- aspects related to people's (potential or effective tourists) accessibility to enotouristic destinations – issues regarding distance, travel time, cost etc.

The issue observed in the studied region and which represents the object of this research focuses on both the modest valorification and capitalization of Moldovan enotouristic resources. According to Mount and Iatu (2006) the valorification refers to the actual exploitation of resources and capitalization refers to the performance of their exploitation. At the same time, individual researches conducted in enotourism sector showed that enotourism business dynamics have been lately unequal at country level.

Thus, the following question arises: *what are the possibilities and sectors which stimulate enotourism development in Moldova and what are the problems that hinder this development?* Possible answers are linked to enotourism resources' exploitation, tourism infrastructure and accessibility of enotouristic destinations, as well as to the role of potential enotourists and stakeholders in enotourism development in Moldova.

Primary observations lead so far to the *assumption* that the modest development of enotouristic destinations with a satisfactory potential is a result of a poor promotion and investment by stakeholders in the tourism and wine sector, but also as a result of poor awareness of the population on the need to develop tourism in Moldova.

The study's main objective is to work out a research which would identify directions and possibilities for developing the Moldovan enotourism based on the oenotouristic potential of the country and the development models of countries with experience in the enological sector.

It will focus exactly on the following:

- Understanding the concepts related to enotourism notion;
- Identifying methods for developing enotourism in countries with enotourism experience;
- Conducting a territorial diagnostic on winemaking and enotourism;
- Identifying both issues and advantages of enotourism supply in Moldova by comparing it to Burgundy wine region;
- Identifying tourists' perceptions and motivations in order to develop enotourism;
- Identifying opinions of vinegrowers / winemakers on enotourism development
- Analyzing the accessibility factors which influence the development of enotouristic destinations in Moldova;
- Proposing reflections on future enotourism development opportunities.

The scope of the study is to identify and assess the issues and advantages in developing enotourism in Moldova in order to propose new development opportunities. The research theme aims to provide a new form of exploitation of vineyards and wine cellars, by analyzing enotouristic resources in this area and comparing them to Burgundy wine region. The study also enables the understanding of the need to develop new forms of tourism in Moldova based on traditional authentic resources.

The main method used in this study is the survey which is necessary for systemic collection of information on Moldovan enotourism through:

- Questionnaire - which will have as target groups the enotourists, vinegrowers and other enotourism stakeholders. It aims to identify the motivations and experiences of tourists on wine sector, but also to identify the role of producers in enotourism practice and development. There will be established several strategic points such as awareness level of potential tourists on what enotourism is, their preferences on enotouristic products barriers that could limit the tourism development of existing vineyards, such as: geographic location, distance from major cities compared to the main touristic sights, financial limitations. Also, it will be identified the tourist image of Moldova from the tourists' point of view, but also the profile of the typical tourists interested in this form of tourism.
- Interview – it will be used to collect statistical data obtained from different institutions, it will facilitate obtaining the views of vinegrowers on enotourism development and strategies.

To obtain data on tourist destinations in the absence of previous studies on them, it has been done an on-sight study in the form of interviews. There has been collected information from 40 wineries out of the existing 170 ones in Moldova.

By using the questionnaire, there has been collected information from 500 Moldovan tourists and 100 tourists from the Burgundy region. These questionnaires were implemented at different times during 2012-2014.

Chapter 1, "Enotourism - concepts and theories", aims to present the defining particularities of enotourism, which include:

- Enotourism origin;
- Enotourism definition from the Francophone and Anglophone schools perspective;
- Enotourism system;
- Enotourism supply characteristics;
- Enotourism demand characteristics.

The enotourism activity appeared at the same time with the rise of vineyard to the rank of heritage in order to protect it from fraud rather than to face competition from the New World,

through AOC system. Even if the Europeans are the ones who have developed the New World winemaking sector, the first to outline enotourism as definition were Californians. They have built and landscaped wine routes as complete touristic itineraries.

Enotourism is the relationship between wine and tourism sectors. Enotouristic objectives can be integrated into a table as Table 1, where it can be observed the very close relationship between the components of these two areas. Enotourism appears from the effort of the vinegrower / winemaker to satisfy the needs of tourists by offering accommodation, catering and other cultural activities solicited by the latter in order to sell his/her product and promote his/her wealth.

Table no.1 *The interconnection between the wine and tourism sectors according to Lignon Darmaillac 2011*

ENO...	↔	...TOURISM
<ul style="list-style-type: none"> • Vineyards; • Wineries, castles, trade houses; • Wine centers, research stations. 		<ul style="list-style-type: none"> • Accommodation in the vineyards; • Catering, wine tasting, food and wine tasting; • Winemaking Museums; • Cultural activities, wine-therapy, oenoparks.

Enotourism focuses on four main elements which consist of marketing opportunities of the wine-producer (if we look at it in terms of direct sales), consumers' motivations and experiences (amateur-tourists who choose to visit wine zones / regions), landscapes or the "terroir" (discovering wine-producing region both from a cultural, technological, pedoclimatic perspective, etc.) and the image of the wine-producing region (promoted by enotourism stakeholders).

Enotourism system comprises three main elements: wine culture, territory, tourism based on authenticity, sustainability and competitiveness. This system is developed through the project Vintur (Wine tour). It represents an enotourism development method for the European wine-growing regions in a sustainable, original and competitive way.

In 1999, at the request of the French Agency for Tourist Engineering (Agence Française d'Ingénieries Touristique - AFITI), TMO (Institute for Research in the service of economic and social development of enterprises and territories), it has been done an inquiry on enotourism supply and demand. This study allows identifying typologies of enotourism products and outlining new performance categories:

Table no. 2. *Types of enotourism products*

<i>Wine routes</i>
<i>Vineyard trails for hiking</i>
<i>Circuits and organized stay in vineyards</i>
<i>Oenology internships</i>
<i>Vineyard tours</i>
<i>Wine museums and ecomuseums</i>
<i>Wine houses (wine bars)</i>
<i>Celebrations and festivals</i>
<i>Local wine exhibitions and fairs, auction sales</i>

Enotourism is a broad concept, there is no single profile of consumers, but many, and it is important to note that depending on the type of client it will not have the same behavior and the same requirements. The two different categories of consumers should be distinguished. In order to do this, there have been conducted many studies aiming to segment the consumers of enotouristic products.

AFITI (French Agency of Touristic Engineering, which became ODTIT France – French Agency for Tourism Observation, Development and Engineering) distinguishes four categories of enotourists in French wine regions by their motivations, profiles and different consumption habits:

- Vineyard lovers;
- Wine lovers;
- Region lovers;
- Tourism lovers.

Another classification has been made by Charters S. and Ali-Knight (2002) of Australian enotourists. They outline other four categories which define the wine-admirers and vineyard-admirers (tourist):

- Wine lovers;
- Experts;
- Wine interested;
- Novices.

Comparing this enotouristic products consumers' segmentation, it can be mentioned that Europeans are focused on wine culture namely by identifying a lifestyle and enotourists from the New World are focused on winemaking and vinegrowing knowledge.

Chapter 2 describes enotourism development of each country that has a significant wine-producing experience at international level.

The wine world can be divided into two categories:

- Countries where enotourism is a separate activity in the wine region and where visitors come specifically for wine.
- Countries where enotourism can be considered a wealthy aspect of the region, where vinegrowing and winemaking are part of inhabitants' daily life.

The first category is specific to the members of the New World, especially to the United States (namely Napa Valley), then to Australia and New Zealand. In these three countries there aren't small producers. Wineries are very large factories dealing in particular with tourists and sales. Mass tourism lays at the basics of enotourism development in these countries. The second category is more specific to France than to other European countries like Spain, Italy etc. (which are on the borderline between the two types). In France, the best kept is the traditional wine culture, which is the main objective of enotourism development.

Chapter 3 examines the two sectors of the Moldovan economy:

- The first part presents the situation of tourism sector and its outlying development in Moldova in European context,
- The second part presents the wine sector and analysis on Moldova's wine-producing rank at European and international level.

In the context of significant lacking of natural resources and poor economic and social situation, Moldova sees the development of touristic sector as a possible alternative source of income. Even if from this point of view the country can be considered a European periphery, having the penultimate rank by its 89,000 international tourist arrivals (according to UNWTO,

2014), the law defines tourism as one of the priority areas of the national economy (the Parliament of the Republic of Moldova, 2006).

The Republic of Moldova plays an important role on the international wine market having the 6th rank in Europe and the 12th in the world by export volumes. Foreign market absorbs 90% of national wine production.

In order to identify the issues and advantages of enotourism development in Moldova, **Chapter 4 and 5** will present and analyze this problem by comparing it to enotourism development in Burgundy wine region.

Agricultural activity is the one that builds the landscape, it strongly structures rural areas, marking transformations. The specificity of vineyard landscape influences and forms the tourists' vision from the authenticity point of view of the wine-growing region. The first subchapter of Chapter 4, will analyze the landscape of the two territories, from a whole to particular context, namely the distribution method of vine-growing territories, but also the organization of the rural vinegrowing areas with all specific symbols and motives. In order to see what is missing in Moldova in terms of landscape to become an attractive wine region like Burgundy, there will be considered the two territories. Thus, the two territories describe the characteristics of climate, soil and approximately similar topography. The difference can be seen in the exploitation of these assets. Burgundy uses all resources, both material and intangible ones to develop vineyard landscapes which are attractive to tourists. On the contrary, in Moldova vineyards are still a territorial resource for residents, which is a reason why the vineyard landscape is unattractive to tourists.

Burgundy wine landscape is very well developed thanks to the AOC system. Between Auxerre and Macon, Burgundy region produces over 100 controlled designations of origin. Among the most prestigious in the world, these wines are traded by producers and traders from six regions with distinct characteristics. In order to meet the EU requirements in Moldova, there have been created four wine-growing regions in 2008, which will have to design vineyard landscape in such a way so as to give it heritage value. This wine regionalization has not been implemented so far, it exists only in theory. Very few growers implement the system of controlled designation of origin.

Chapter 4 also highlights the advantages and issues of the development of the two regions in terms of enotouristic supply both within the cellars and within the village / region. Here it was noted that Moldova first of all needs to improve the situation of tourism at country level, in order to be able to further invest in enotourism more securely. It is necessary to diversify the enotourism supply through a cooperation among local/regional stakeholders. Also, most of the existing accommodation structures from provinces do not meet international standards and norms, being nearly inaccessible and totally unattractive. As it has been observed in Burgundy region, the accommodation structures which meet this type of tourism are small and medium sized agrotouristic guest houses from the village or even the cellar itself, this should be one of the main investment sectors in Moldova. The development level is much lower than in the Burgundy region and Moldova isn't even on the halfway.

Another subchapter of Chapter 4 presents the development perspectives of enotourism according to vinegrowers / winemakers. The enotourism supply needs to be continuously renewed to be competitive. Developing supply depends on how willing are vinegrowers / winemakers to proceed with investment and promotion in terms of enotourism. In order to sustain this assumption, it was conducted a questionnaire with 40 Moldavian producers and 40 French producers in Burgundy wine region. The purpose of this research method is to identify wine producers' views on the development perspectives of enotourism and to compare how open

Moldavian and Burgundian vinegrowers are to develop this field. Thus, it was found out that the Moldavian producers are more reluctant in terms of enotourism development than the Burgundians. The wine trade is the main goal of Moldavian wineries and enotourism is just an additional profit for some of the small producers.

Price comparison of enotouristic products is also an objective of Chapter 6. Hence prices in Moldova are much higher than those of the Burgundy region, if we relate them to the national average income in each territory. It is therefore necessary to fix some affordable prices, not just for foreign customers, but also to local Moldavian ones.

The role of enotouristic projects in the rural areas is presented in the last subchapter of Chapter 4. Thus, the enotouristic projects have a very important role in rural areas of the Republic of Moldova, meaning that they attract visitors, create new jobs, exploit the cultural and wine-growing potential of the area, they develop transport infrastructure. However there is still needed more development action to develop both tourism infrastructure in localities, to promote wine-growing regions and to inform the local population and the producers about the role and the need of enotouristic projects in the locality.

Chapter 5 aims to identify the profile of the tourist in Moldova, his/her motivations and perceptions, but also the image of Moldova as a wine-producing country in the world. Enotourism development, as well as any other form of tourism, is dependent on the aspirations, needs and consumer demands. Currently, in Moldova, there is not a big focus on studying the customer, this being a "less important method in entourism development" (as stated by vinegrowers / winemakers) and this fact being motivated by the fierce lack of competitiveness in this sector.

The questionnaire method enabled the segmentation of enotouristic products customers and it highlighted their motivation and behavior in order to offer new development methods for developing enotourism in Moldova. Thus, the Moldovan enotourism supply shall largely correspond to a relatively young customer, who is resident and has an average salary in the country's economy. It is therefore necessary to adjust the price for this type of customer, given that displayed prices for travel packages to wineries are huge.

It was shown that the perceptions of enotourists are very vague, which explains the need for a strong promotion of this field among the Moldovan population, through motivating eventual visits to wineries or through some means and materials which are also easily accessible to rural population. If the classification undertaken by Charters S. (2002) is going to be considered, it can be concluded that in Moldova there are two categories of enotourists: *novices*, curious tourists who are interested in wine tasting and "wine interested" tourists who are interested to obtain information regarding the whole winemaking process. Thus, for this type of customers, the supply should be more attractive and should contain surprising elements in order to nicely impress the customer who will certainly further promote this offer.

Chapter 6 explored some operation facets of enotouristic destinations depending on their rate of spatial accessibility. The prices fluctuations and the annual number of visitors by road distance from Chisinau demonstrate a significant impact of spatial accessibility on the functionality of the analyzed centers. This impact is reflected primarily on the annual number of visitors and secondarily on the existent prices. In the peripheral areas, such as the territory of the Republic of Moldova in the European context, the enoutouristic destinations are integrated insufficiently into regional circuits. In those circumstances, the location of the destination plays a very important role, especially in terms of distance from the main existing attractions or to the main entry gates to the country. The reason which mainly determine the customers' decision is to reduce travel costs. Further studies could explore strategies which would facilitate the valorification of spatial

accessibility at a larger extent when it represents an advantage or on the contrary would help overcome the situation when it presents a disadvantage. Also, further research could address the way in which the establishment of circuits and increased cooperation and coordination between enotouristic destinations can counterbalance the low rate of spatial accessibility, both at international and local levels.

This chapter also concludes that the formalization of a touristic wine route is not enough for the development of enotourism. In order to increase the attractiveness of the supply it is necessary to diversify activities carried out in vineyards, in wine complexes, but especially within the region / city. The development of enotouristic products requires a close connection between the stakeholders of the two sectors: winegrowing and tourism, in the framework of a "win-win" strategy so that tourists could access a wide supply on the Wine Route.

In conclusion, this study approach offered the opportunity to get to know in detail the components of enotourism, but also its role in the Republic of Moldova. It was noted the importance of this type of tourism in the development of both the services sector and trade. This demonstrates, therefore, that the Moldovan vinegrowing and winemaking is a very important "business card" for the country's image.

By far, enotouristic projects began to play an important role, especially in rural areas of Moldova, meaning that they attract visitors, create new jobs, capitalize cultural and winegrowing potential of the village, develop transport infrastructure. All this is due to an important wine-producing potential having the resources to deal with the competition coming from winegrowing countries worldwide.

However, enotourism is not an internationally competitive field for Moldova. Compared to Burgundy, Moldova has many deficiencies in terms of enotourism. If it is to exclude tourism infrastructure (which requires huge development efforts), Moldova needs a well-defined strategy for enotourism. For a region which develops a consistent enotourism, it is necessary a close link between many desires or requirements and ways to implement them. They start with training, education on hospitality for tourism stakeholders, namely for winemakers (including language learning) and finish with the promotion and advertising for attracting visitors' interest for landscapes, demonstrations, tastings etc. The attraction of vineyard landscape is an asset to talk about wine. Tourists have to understand that behind a vineyard landscape there are the producers and they can reveal the secrets of the quality wine and many other important things involved in its production. Therefore landscapes there is a need of hospitality, wine routes, websites, tasting and initiation together with local cuisine. Moldova would also need a geographical and historical unity. Burgundy is a wine-growing region which in the best brought together way all these components: the oldest wine route from France, gastronomy, landscapes, history, wines and well identified grape species, becoming one of the most popular enotouristic destinations for international tourists.

For Moldova's enotourism development strategy it could be a good way to structure its supply by using all the energies, skills, abilities. Enotourism is not a risky sector, on the contrary, when there is a potential to attract tourists and it is known that most tourists who come now in a winemaking region are among those who prefer wine and vineyard admirers, the chance of a big success is not far away. To get a good demand it should not be forgotten that the best tourism customers are still the residents of the region. Therefore, it is needed an upstream training to inform and educate them, to give them the stakeholder role, inviting them to events, revealing them all wine types and the wealth of the landscape (most often this part is ignored) because they are those who are going to recommend to their family and friends a particular sight or a particular winery upon their choice.

In comparison with Burgundy region, there have been identified the issues of the Moldovan tourism and there have been developed possible solutions. The primary issue that underlies the tourism development is the state of tourism infrastructure. Most accommodation structures in Moldova do not meet international standards and norms, and the majority of roads towards many enotouristic attractions are almost inaccessible. State investments in this field are a basic necessity for tourism development no matter what type it is. The situation in the Burgundy region allows identifying the type of accommodation structure that Moldova should count on. These are rural guest houses which allow tourists to experience traditional ambience throughout their stay.

The lack of link between tourism and winemaking stakeholders is also an obstacle in enotourism development. To increase the supply attractiveness it is necessary to diversify activities carried out in a vineyard, in a wine complex, but especially in the region / villages. The development of enotouristic products requires a close link between the stakeholders of both the wine and tourism sectors, in the framework of a "win-win" strategy. State intervention is needed to create associations which would stimulate and motivate local producers to develop enotourism. Here the main role will be to intensely promote the Moldavian wine culture and to create the image of a wine-producing country.

The Soviet system oriented towards quantity rather than quality still prevails in the country. This makes Moldova unattractive to tourists. For Moldova to become competitive in this field it is necessary to increase both the quality of wines and vineyard landscape, and to privatize, even partially, the wine sector. The transformation of the vineyard landscape from Burgundy wine region into a heritage for a long run, has resulted into a growing number of tourists interested namely in this authentic and famous resource. Moldova has already conducted a program for the development and protection of the vineyard heritage, but it first requires awareness among population and producers that the vineyard landscape is not only a territorial resource, but it also has a heritage value. This requires investment in the promotion of vineyard landscape, landscaping, vineyards protection and education of the Moldavian population so as to make Moldova become attractive for tourists and a commercial market both from a material and spiritual perspective.

The results of the interview method is the strong point of this study, which provided the opportunity to identify the views of both the producers and tourists, needed by local and national authorities for projects development. Through this method there were presented the tourist typologies the enotourism supply should focus on.

Also, a very important part of this study is the role of the accessibility of Moldavian enotouristic destinations, which is very necessary to authorities and other enotourism stakeholders for future enotouristic projects. Thus, it was shown that the location of an enotouristic destination plays a very important role in attracting tourists. The distance to the main attractions and especially to Chisinau (the main country's gateway for tourists) is an important element for the location of a cellar for example, due to lower travel costs.

Thus, it was validated the main *assumption* of this study that the low but still satisfactory development of enotouristic destinations of good potential is a result of their poor promotion and investment by tourism and winemaking stakeholders, as well as of poor awareness of the population and producers of the need for tourism development in Moldova.