



FACULDADE DE LETRAS
UNIVERSIDADE DO PORTO

Master in Tourism

**Wine Tourism: An Opportunity to Increase
International Awareness towards Moldova**

2015

A Master Thesis of Andrei Trofimov (201301713)

Supervisor: Dr. João Paulo de Jesus Faustino

Acknowledgments

This thesis would not have been completed without the enduring encouragement and support of certain persons to whom I am very grateful.

First of all I would like to thank my supervisor Dr. João Paulo de Jesus Faustino. His professional and academic expertise was of crucial importance for my project. His key support, guidance and advices were very helpful and helped me to improve myself and reach my goals. I gained not only academic knowledge by also a big moral support across the long way.

I would also want to thank all the professors and academic staff from the Faculty of Arts from University of Porto and International Office, I gained profound knowledge and support in different subjects, which helped me a lot in my academic and professional growing.

Moreover, I would like to thank all the interview people who have spent their precious time and contributed to this paper with remarkable information from wine industry and tourism from Moldova.

Special thanks also for all the new friends and relations that I made here during my stay in fascinating city of Porto, it was a great experience to be a part of a multinational environment sharing culture, traditions and great time.

Last but not least, I would like to express all my gratitude to my beloved family mom, dad and brother who kept me motivated and believed in me through all the process.

And of course, my beloved wife, Tatiana, who went with me in this hard process and being a constant source of encouragement and advice. I am lucky to have you and I am grateful that you have believed in me all the time.

Abstract

The objective of this thesis was to analyze the wine tourism as an opportunity to increase international awareness towards Moldova, and to explore in which way the wine tourism and major wine tourism stakeholders can contribute to the overall Moldova's attractiveness as a tourism destination. Triggered by the central objective, the research investigates the topic of Moldavian tourism sector and identifies the role and the place of wine tourism in it. Also it identifies the institutional framework that has major impact in the development and promotion of the tourism sector. Following, major actors are selected and analyzed in separate case studies for providing better view of the studied area. The primary data was collected through semi-structured interviews with major actors from Moldavian wine tourism sector and together with the secondary data provided by literature and articles are indicating that wine tourism sector has great potential on Moldavian tourism market and is an invaluable asset for promoting Moldova as a tourist destination and to increase international awareness towards it. However there is a range of problems regarding tourism and wine tourism sector mainly resulting from the relatively new Moldova's status as independent country and all the problems related to transition economy, also the low tourism number arrivals, the imperfect statistical data collection procedures and the bad experience from previous tourism development strategies applied in tourism sector. The situation should greatly improve with the rebranding of the wine tourism private companies, and the public institutions approaches towards the wine tourism sector development and promotion. Several different marketing approaches were developed and implemented which should increase the Moldova's potential in attracting international visitors. Wine tourism is identified as a major contributor and forwarder of the Moldova's image on national and international markets as by individual stakeholder's activity, as well as by the promotional activities made by major public actors. The research shows that by better cooperation between public and private players involved in wine tourism activity, great result can be achieved for increasing international awareness towards Moldova, despite small funding of the promotional activity and overall problems.

Key words: Moldova, Tourism, Wine Tourism, Promotion, Wineries, Destination Attractiveness

Table of Contents

Acknowledgments.....	2
Abstract.....	3
List of figures.....	7
List of tables.....	8
List of abbreviations.....	9
Chapter 1. Introduction of general issues.....	10
1.1 Introduction and relevance.....	10
1.2 Research objectives.....	11
1.3 Methodology.....	12
1.3.1 The method.....	13
1.3.2 Collection and analysis of the data.....	14
1.3.3 Design of personal interviews: study and test area.....	15
1.3.4 Research limitations.....	16
1.4 Structure of the study.....	17
Chapter 2. Literature review.....	18
Introduction.....	18
2.1 Tourism definition.....	18
2.1.1 Touristic demand.....	19
2.1.2 Touristic supply.....	19
2.1.3 Rural tourism.....	20
2.1.4 Urban tourism.....	21

2.1.5 Cultural tourism.....	22
2.1.6 Nature based tourism.....	22
2.2 Destination definition.....	24
2.2.1 Destination management and marketing.....	25
2.2.2 The Competitiveness of the destinations.....	27
2.3 Wine tourism.....	29
2.3.1 Wine tourism definition.....	31
2.3.2 Supply and demand sides of Wine Tourism.....	32
2.3.3 Wine tourist profile.....	35
2.3.4 Wine routes	37
Chapter 3. The Background of Moldavian Tourism.....	39
Introduction.....	39
3.1 General overview of tourism in Moldova.....	41
3.2 The institutional framework of Tourism sector in Moldova.....	44
3.3 Advantages of Tourism in Moldova.....	47
3.4 Problems of Tourism in Moldova.....	49
Chapter 4. Wine tourism. Case study Moldova.....	52
Introduction.....	52
4.1 Wine tourism in Moldova.....	53
4.2 Wine tourism within National Strategy for Tourism Development.....	57
4.3 Wineries and underground cellars.....	60
4.3.1 Cricova Winery.....	61
4.3.2 Purcari Winery.....	63
4.3.3 Milestii-Mici Winery.....	65
4.4 Wine roads in Moldova.....	68

Chapter 5 Promoting Moldova through wine tourism.....	78
5.1 International practices of wine tourism marketing.....	80
5.2 National Festivals.....	83
5.3 Wine day.....	85
5.4 Wine of Moldova brand.....	87
5.5 Discover the Roots of Life Moldova.....	88
5.6 Moldavian country logo and promotional TV spot.....	90
5.7 National and International fares and exhibitions.....	91
5.8 Mobile application.....	92
Conclusions and recommendations.....	95
Bibliography.....	99
Appendices	
Appendix 1: Questions used in the semi-structured interview.....	112
Appendix 2: Numbers of international tourist arrivals to Moldova.....	114
Appendix 3: Numbers of international tourist arrivals to Moldova.....	116
Appendix 4: International visitors satisfaction towards Moldavian touristic destinations...	117

List of Figures

Figure 1: Structure of the study.....	13
Figure 2: Overview of nature based tourism and ecotourism.....	24
Figure 3: Destination product and destination mix.....	26
Figure 4: Wine tourism system Hall.....	34
Figure 5: Wine tourism system Getz.....	34
Figure 6: Physical map of Republic of Moldova.....	39
Figure 7: Travel & Competitiveness index.....	43
Figure 8: Areas under vines in major wine producing countries.....	53
Figure 9: Wine Tourism regions of Moldova.....	55
Figure 10: Cricova wine cellars.....	61
Figure 11: Cricova vineyards.....	62
Figure 12: Purcari vineyards.....	63
Figure 13: Purcari wine cellars.....	64
Figure 14: Milestii Mici wine cellars.....	66
Figure 15: Milestii Mici vineyards.....	67
Figure 16: Wine route: Orheiul Vechi.....	69
Figure 17: Wine route: Codrii Moldovei.....	70
Figure 18: Wine route: Lapusna.....	71
Figure 19: Wine route: Stepa Buceagului.....	72
Figure 20: Wine route: Purcari.....	73
Figure 21: Wine route: Chisinau-Balti.....	74
Figure 22: Wine route: Dunarea de Jos.....	75
Figure 23: Gustar festival.....	84
Figure 24: Medieval festival.....	85
Figure 25: National Wine Day event.....	86
Figure 26: National Wine Day event 2.....	87
Figure 27: Moldova's touristic logo.....	90
Figure 28: Moldova's tourism mobile application interface.....	92

List of Tables

Table 1: Interview respondents.....	16
Table 2: Wine Tourism definitions.....	32
Table 3: Wine tourist profile.....	36
Table 4: Number of foreign visitors and foreign tourists in Moldova.....	50

List of Abbreviations

ADTM – Association of Tourism Development in Moldova

ANAT – National Association of Touristic Agencies from Moldova (Asociatia Nationala a Agentiilor de Turism din Moldova)

ANTRIM – National Inbound Tourism Association of Moldova

ANVV – National Agency for vine and wine (Agentia Nationala a Vinului si Viei)

ATRM – Tourism Agency of Republic of Moldova (Agentia Turismului a Republicii Moldova)

BNM – National Bank of Moldova (Banca Nationala a Moldovei)

CEED – Competitiveness Enhancement and Enterprise Development USAID program for Moldova

CIS – The Commonwealth of Independent States (Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine and Uzbekistan)

DMO – Destination management organizations

EU – European Union

FPTM – Deferation of Tourism Promotion from Moldova (Federatia de Promovorare a Turismului din Moldova)

ISO – International Organization for Standardization

NSC – National Statistical Bureau of Moldova

OECD – Organization for Economic Co-operation and Development

OIV – International Organization of Vine and Wine

UNDP – United Nations Development Programme

UNSTAT – United Nations Statistics Division

UNWTO – The United Nations World Tourism Organization

USAID – United States Agency for International Development

TSA – Tourism satellite account

WEF – World Economic Forum

Chapter 1. Introduction of general issues

1.1 Introduction and relevance

According to United Nations World Tourism Organization (UNWTO) the international tourist arrivals are forecasted to reach 1.8 billion by 2030, increasing by an average 3.3% a year. The international arrivals in emerging economy destinations such as Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa are expected to continue growing at double the pace +4,4% a year. By 2015, emerging economies will receive more international tourist arrivals than advanced economies, and by 2030 their share is expected to reach 58% (UNWTO, 2014a).

In the recent decades there has been spotted an increasing interest towards wine tourism that in the actual context of economic uncertainty represents a viable instrument to take advantage from the most developing sector (tourism), combining the impacts both on wine and tourism industries, as well as enhancing the overall image of the destination.

Since food and wine have always been an indispensable part of a tourist experience, through time it turned into a strong, distinct travel product that is attracting millions of visitors and generates a wide range of socio-economic benefits, in the same time contributing to a deeper acquaintance and revelation of the destination by both local and international visitors and in this way extending the length of their stay period and spending (Raut, Bhakay, 2012).

In this context, the smaller developing countries that don't possess a wide range of tourist attraction resources can use wine, wine-production territories and other related activities as main attraction that in combination with other rural and nature based attractions can shape an attractive offer able to generate a tourist flow (Asero, Patti, 2009).

Moldova, despite its small size and lack of sea, mountains and other important attractions has a great tourist potential, strongly pointing on rural, wine and cultural tourism, due to a great variety of natural landscapes, unique geological monuments and suitable climatic conditions – offering the possibility to experience the full range of 4 seasons.

Moldova is a wine producing country, with a wine making history dating several thousand years back and a great experience in this field, accumulated from Thracian, Greek, Roman, French and other cultures. The total area of vineyards is about 107.000 hectares, where are cultivated more than 100 grape sorts.

However Moldova receives annually a low number of tourists (84 thousands in 2014) which implies the identification and analyses of the factors blocking the arrivals of greater number of visitors to the country. As stated by (Crouch, 2007) in order to increase awareness and competitiveness of a destination, there should be a combination of inherited resources with created infrastructure. Applying efficient promotion to these factors will transform destination into appealing tourism supplier.

In this context, the paper will analyze the wine tourism as a tool to promote Moldova on international tourism market. Getz et al. (2006) state that image factors for a wine tourism destination should be viewed as the core wine product which will be identified and analysed their background, potential and the role in increasing international awareness towards Moldova as a tourism destination.

1.2 Research objectives

The aim of the study is to investigate wine tourism in Moldova as a tool to increase international awareness towards the country. Following derives the main research question of the study:

Is Wine Tourism an opportunity to increase international awareness towards Moldova as a tourism destination?

Before answering the main question several sub-questions need to be addressed. These questions will deepen the research area of tourism and wine tourism in Moldova and will help to evolve the answer to the main question.

1. What is wine tourism?
2. What is the background and current situation of Tourism sector in Moldova?

3. What are the place and the role of the wine tourism in Moldavian tourism sector?
4. Who are the major stakeholders in promoting the wine tourism from Moldova?
5. What are their contributions to the Moldavian image as a tourism destination?
6. What are the wine tourism's promotion tools that contribute to the Moldova's image as a tourism destination?

The aim of the first question is to differentiate the wine tourism from the broader sense of tourism and will be answered mainly from literature review. The rest of questions will be answered partially from literature review and partly by the primary and secondary research made by the author.

1.3 Methodology

The concept of wine tourism is relatively new on the international market and is still the need of further academic research, in Republic of Moldova the situation is much worse, as there are very few academic researches that focus on wine tourism topic separately, not in the larger form of rural tourism or tourism in Moldova. As the main objective of this study is to analyze if wine tourism presents an opportunity for Moldova to increase international awareness towards the country as tourism destination, the focus of the author was put into identifying the relevant international literature and researches studying the tourism and wine tourism in particular. As the researched case study is the country of Moldova, further was analyzed the background and current situation of the tourism sector in Republic of Moldova.

Analyzing the tourism sector of the country, the role and the place of wine tourism was studied, identifying the major stakeholders, advantages and problems of the sector.

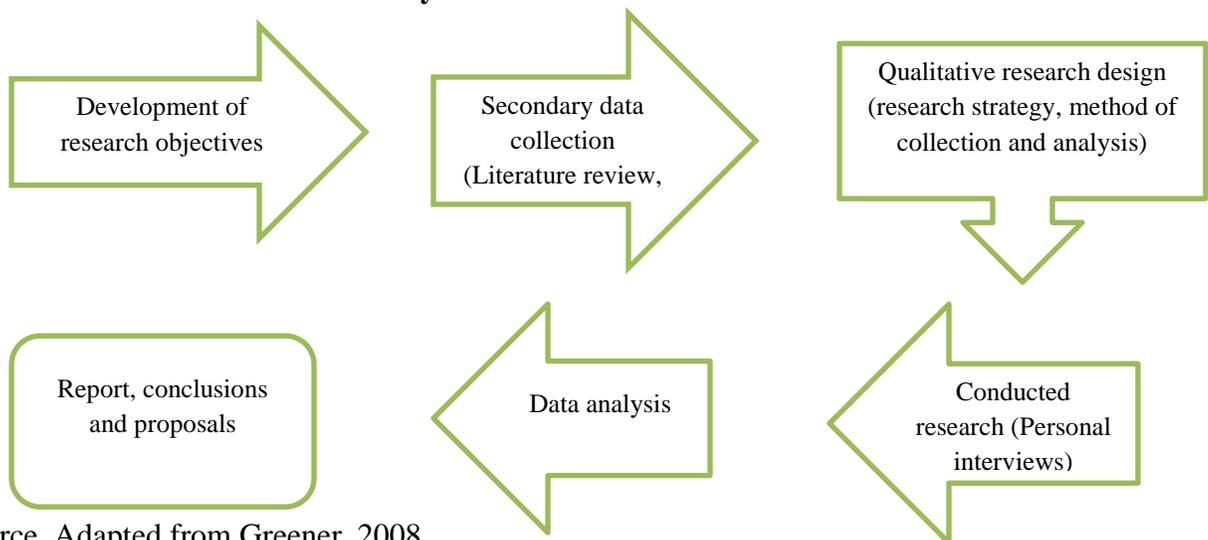
To better explain the processed work the Methodology section of the paper is divided in 4 parts: the method used in the study, collection and analysis of the data, the design of the personal interviews: study and test area and in the last part the limitations of the study are explained.

1.3.1 The method

As stated by (Veal, 2006) the research can be conducted in many ways, therefore all the researches have the common process that represent a set of correlated actions which constitute the investigation process. The entire methodological process used in this study is presented in Figure 1.

First of all the scope of this study was to identify the research questions and to define the research objectives presented in the previous section. Following a systematic study of the available literature from specialized domain was conducted to identify the main concepts and to structure the topics of research. According to (Boodhoo, Purmessur, 2009) the research process is usually cyclic, as the conclusion and findings of the investigation often generates new ideas and problems that should be further researched.

Figure 1: The structure of the study



Source. Adapted from Greener, 2008

The research process can be defined as of qualitative or quantitative approach (Greener, 2008). Qualitative research is described as “easy” or “soft” data and is usually presented as observation, words, and descriptions. The Quantitative approach is described more as “hard” or “complex” data and is represented by numbers or the quantity of some research phenomenon or in other words it is the knowledge and the process that will measure the

investigated knowledge. The quantitative data (Boodhoo, Purmessur, 2009) are the observation that will be measured in numbers rather than in words.

The methods used in this study are a combination of qualitative data analysis and primary research and qualitative analysis of secondary research. As the primary research gives a chance to obtain close and actual information about the researched object (Veal, 2006), it is important to have this data in the research process. The source of primary data is semi-structured interviews held with the major stakeholders from Moldavian wine tourism industry. The interview is useful for this study as it enables to get the story from a participant's experience (Greener, 2008). The interviewer can pursue in-depth information around the topic (Veal, 2006) and permits to feel the studying object from the people which have enough information and knowledge to answer the given questions.

The second method used for generating data is secondary research which includes analysis of several relevant sources: literature review from books, scientific articles, journal and newspapers, different statistics, internet websites and case analysis.

The analyzed data was selected in that form that will help to answer the following questions: key concepts of tourism and wine tourism in the academic framework, development and actual situation of the tourism sector in Moldova, the role and the place of wine tourism niche in Moldavian tourism, Moldova's promotion as a touristic destination, wine tourism role in promoting Moldova as a tourism destination, the benefits and problems of the wine tourism sector and tourism in general in Moldova and the correlation between the wine tourism as an opportunity tools to increase international awareness towards Moldova as a tourism destination.

1.3.2 Collection and analysis of the data

The qualitative research interview was selected as more suitable for this study as this method allows getting personal viewpoints across the research object and in-depth of the problems (Veal, 2006). The advantage of the interview is the possibility to ask questions which are closely related to the object of the research and to observe the answers reactions (Greener, 2008). The type of the interview chosen for this study is semi-structured interview with the

representatives from the identified major stakeholders from wine tourism sector from Moldova.

Secondary data consist from the studying of other written materials and reports regarding the development of the wine tourism sector in Moldova. Strategic plans developed by the public stakeholders that have major impact to the course actions of the entire sector, and the exploration of the defined case studies: 3 biggest wineries from Moldova. The research concludes with policy proposals and recommendations for tourism and wine tourism sector based on the studied data and recommendation for further researches.

1.3.3 Design of personal interviews: study and test area

The study area was selected according to the study area to the research paper: Republic of Moldova, there were identified the major stakeholders from wine industry that contribute to the development and promotion of the wine tourism in Moldova. The biggest contributors to the wine tourism were found to be the wineries (as their facilities and services: vineyards, cellars, products) represent the main touristic attraction. However in Moldova there are located more than 170 wineries, factories and processing plants related to wine production, the majority of them do not have special attractions or impact on the wine tourism market. From the shortened list, 5 major wineries were selected and the inquiry to participate in the interview was sent, 3 of them (Purcari winery, Cricova winery and Milestii-Mici winery) responded positively and the interview was held with their representatives.

Also as described by (Getz, 2000) “the wine tourism consists not only from wineries, vineyards and attractions...but also from the organizations regulating the wine tourism sector”, there were identified the public organizations that have direct and indirect impact on the wine tourism development and promotion. The most important such institutions are Tourism Agency of Moldova (state regulated) and non-governmental organization Association for Tourism Development in Moldova. From them, Tourism Agency responded positively to the interview proposals and the interviews was held (1)

Table 1: Interview respondents

Respondent	Location	Organization
Respondent A	Codru wine tourism region	Cricova winery representative
Respondent B	Stefan Voda wine tourism region	Purcari winery representative
Respondent C	Codru wine tourism region	Milestii-Mici winery representative
Respondent D	Chisinau city	Tourism Agency representative

Source. Own elaboration

The data was collected with the help of semi-structured interviews constructed from (Greener, 2008) research (Appendix 1) where are the sample of the questions and subjects covered in the interview process. Also the participant observation method was used where the author is taking part in the study environment permitting the collection of detailed information and the analysis of social behavior techniques in their actual environment (Greener, 2008). The researcher also has visited all the mentioned wineries as a wine tourist in the past 5 year which allowed to experience several subject covered in interview by himself.

1.3.4 Research limitations

The research limitations consist from the fact that only a very small part of wine tourism stakeholders were covered in the interview (thus the most important). The wineries being interviewed are the biggest and the most developed and well-known from the Moldavian market, the points of view from other ones may vary significantly. Also only 1 winery is private owned, the remaining 2 are entirely or partially owned by Moldavian state.

The National Agency which took part in the interview has the biggest impact on the development and promotion of tourism sector in Moldova, however its point of view concur with the official declarations made by other institutions, and several topics were covered by official statements and do not necessarily coincide with the respondent opinion.

1.4 Structure of the study

The study is divided into 5 chapters and introduction and conclusion. In the introduction section is outlined the relevance of the research and is summarized the study structure, Chapter 2 provides a review of the used literature and is divided into 3 major sections: the overview of tourism background and definitions, destination marketing and competitiveness and the reviewed literature regarding wine tourism.

Chapter 3 comprises the background of Moldavian tourism and is divided into 4 sections: general overview of Moldavian tourism, further is analyzed the institutional framework of tourism sector in Moldova and is finalizing with the problems and advantages of the tourism is Moldova.

Chapter 4 goes into a deep research of the wine tourism sector of Moldova, with the case studies from major stakeholders and the obtained primary data is used. It is divided into 4 sections: background and overview of Moldavian wine tourism, investigation of national strategy for tourism development and the role and place of wine tourism in it; further are analyzed the major wine tourism attractions from Moldova: wineries and cellars, following are presented case studies of the biggest wine tourism suppliers from Moldova with use of primary and secondary data and the chapter is finalizing with the description of the national wine routes.

In Chapter 5 the research is based on Moldova's promotion through wine tourism and some analysis of international wine tourism marketing practices. It is divided into 8 sections: international wine tourism marketing practices, national festivals, wine day, Wine of Moldova brand, discover the Roots of Life Moldova and continues with the Moldavian brand, logo, international fares and exhibitions and e-resources.

The research finalizes with the conclusions of the main finding and some recommendations for the wine tourism stakeholders and future research perspectives of the study.

Chapter 2. Literature review

Introduction

The Tourism sector is one of the fastest growing and profitable economic activities in the world and constitutes one of the most significant contributions to the national economies (UNWTO, 2013). According to (UNWTOa, 2014), in 2013, Tourism sector achieved a 9% of world GDP (direct, indirect and induced impact), providing 6 % of the world's exports and 1 in 11 jobs. In 2013 there were 1087 million tourists, with an estimation of 5 to 6 billion of domestic tourist. The UNWTO Tourism Towards 2030, forecasts for 2030 that on global market, will be 1.8 billion of international tourists, where the share of emerging economies will reach 57%, an increase of 10% from 47% in 2013 (UNWTOa, 2014).

This literature review seeks to identify the literature regarding tourism in general for identifying the niche sector of wine tourism (Chapter 2.1). Chapter 2.2 concerns the destination management and marketing approaches of the tourism sector, while Chapter 2.3 represents an overview of the theoretical background of the wine tourism, wine tourist profiles, wine routes and supply and demand sides of the wine tourism.

2.1 Tourism definition

The word *tourism* appeared for the first time in the early 1800 and was difficult to be defined in the beginning. Nowadays, tourism can be defined from two sides: the offer and the supply side (Cooper, Fletcher, Gilbert, Wanhill, 2008: 11).

The most accepted definition of tourism from the demand side has been suggested by the World Tourism Organization (UNWTO) and adopted by the United Nations Statistical Commission (UNSTAT) in 1991. The definition states that tourism is “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes” (Cooper et al., 2008: 11).

A supply side definition was proposed in 2000 by UNSTAT. It states that “the tourist industry consists of all those firms, organizations and facilities which are intended to serve

the specific needs and want of tourists.” The Commission proposed to introduce tourism satellite accounts (TSA) for measuring economic activities of the tourism sector. These accounts measure the amount of purchased goods and services by visitor to be able to define the size of the whole tourism economic sector (Cooper et al., 2008: 11, 13).

2.1.1 Touristic Demand

According to Bieger and Beritelli (2013) touristic demand can be roughly divided into the following types of demand. It has to be divided into domestic and international demand. Furthermore, a journey can be travelled by a whole group (group tourism) or individually (individual tourism). Also the motivation for travelling influences touristic demand. In general, one distinguishes between business travel and leisure tourism. Business tourism comprises typically meetings, incentives, conventions and events (MICE), whereas leisure tourism consists of sport tourism, cultural tourism, recreational tourism, health tourism and many more types of tourism. Finally, also the type of transport chosen determines touristic demand. Tourists mainly travel by car, train, or plane (Kaspar, 1991).

2.1.2 Touristic Supply

Compared to a normal product a touristic product possesses characteristics which are different. For example, touristic goods and services are composed of several items and parts which form a bundle of services (Kaspar, 1991: 68). These items can be, for example, resorts, museums, landscapes or infrastructure such as catering, accommodation, and transport (Bieger and Beritelli, 2013: 14).

Furthermore, a touristic product is a non-material service. It is often difficult to describe and provided with insecurities. It consists of time, space and personnel. However, before consuming the service, the tourist can't exactly know what to expect, because no success warranty exists (Bieger and Beritelli, 2013: 14).

A further characteristic is that a touristic product possesses external effects. Especially the public is interested in the products offered and decisions on tourism development normally

include public and political authorities (UNWTO, 1993). Tourism also affects the economy, environment, and society. However, tourism is also affected by them (Bieger and Beritelli, 2013: 14).

Tourism needs reliable partners as it strongly depends on local infrastructure. This infrastructure is mainly provided the public, municipality, or state. This shows the importance of the public authority. The acceptance and openness towards tourism of locals is also important for tourism. Furthermore, the local industry providing inputs of touristic products and services have to be considered. Finally, also the agricultural sector has to be included, especially for nature seeking tourism (Bieger and Beritelli, 2013: 15).

Touristic products are often public goods which are consumed by tourists but not paid for. This means that costs are not shared among consumers and no profit-oriented organization will offer it, but public organizations or cooperative organizations. These public goods are, for example, guest information or hiking paths (Bieger and Beritelli, 2013: 16).

Furthermore, touristic offers are personal services. A service is directly connected to the consumer, because it is only produced for him/her. It is not possible to store a service as the production occurs at the same time as consumption (Bieger and Beritelli, 2013: 16).

Finally, there exists a distinction between the booking of a touristic service and its consumption. Often a service has to be booked in advance due to capacity limits. However, due to new technology and the popular use of mobile phones, nowadays the booking of hotels, transport or activities is often conducted during the trip (Bieger and Beritelli, 2013: 16).

2.1.3 Rural Tourism

Rural tourism comprises tourists and visitors travelling to destinations which are away from the major urban and metropolitan areas, as well as from bigger tourist resorts. This implies that the tourists visit smaller villages and communities where they might get to know traditional ways of life. Often rural tourism includes ecological or ecotourism. Thereby, a

focus is set on environmentally friendly travelling through the nature. Normally, trips are taken in smaller groups and organized independently by the travellers (Douglas, 2001).

Rural areas often lack famous restaurants and big hotels, therefore, tourists stay in farmhouses, on campsites, in cottages or similar housings living together with locals. The income earned by tourists is important for the local economy as these areas normally lack bigger industry. It is common to find small business selling traditionally manufacture items to tourists. The main motivation of tourists travelling to rural areas consists in experiencing the natural environment and to find quietness and peace to relax (Sharpley, 1997).

2.1.4 Urban Tourism

In general, urban tourism implies tourists travelling to urban or metropolitan areas, for visiting cities, family or friends. However, there exists a great variety of urban areas which need to be defined. In literature several ways of defining urban areas has been found. Cazes (Cazes and Portier, 1998: 48) determined the number of 20.000 inhabitants as the minimum limit for classifying an urban area. Wober (1997) states, that *The Federation of European City Tourism Office* defined the number of 100.000 inhabitants as a minimum limit. Furthermore, Page (1995) distinguished between the importances of different area types. He classified urban areas, for example, according to being capital cities or cultural capitals and to being metropolitan centres or historical centres (Law 2002: 4).

According to Selby (2004: 11), especially the touristic demand for historical cities is still growing. Therefore, many cities create a strategy how to attract even more tourists. Due to high numbers of tourists both advantages and disadvantages occur which have to be analysed and solved for example with the help of visitor management. In general, marketing is probably the most accepted and successful instrument to attract tourists in urban tourism (Selby, 2004: 11).

2.1.5 Cultural Tourism

According to Ivanovic (2008: 75), cultural tourism has to be defined from the two sides of supply and demand. Cultural tourism supply consists in the destination where each one possesses its own cultural characteristics. These can be both tangible and intangible. The demand side consists of the tourists' desire to get to know and experience the culture of a destination. This implies that the unique culture of a destination is the main motivator for tourists to travel. The two sides of cultural tourism can also be described as product and process (Ivanovic, 2008: 75f).

Bonink (cited in Richards, 1996: 23) defined two approaches of cultural tourism: the technical which can be seen as the product side and the conceptual approach which can be seen as the process side of cultural tourism. The first approach considers the types of attractions visited and the types of products consumed by tourists. The second approach tries to explain the principal motives and meanings tied to the activities executed. It tries to understand and explain why people participate in cultural tourism (Ivanovic, 2008: 76).

The UNWTO also defined two definitions of cultural tourism. The first one is more limited and describes that cultural tourism is the movement of people which possess cultural motivation such as doing field trips, cultural trips, trips to see festivals and further cultural events, visits of monuments or other sites, trips for studying nature (Ivanovic, 2008: 76).

The second definition of the UNWTO is defined more wide and complex. It proposes that cultural tourism consists of tourists wanting to satisfy a human necessity of pleasure for raising their cultural level and for getting to know new knowledge, experiences and encounters (Ivanovic, 2008: 77).

2.1.6 Nature Based Tourism

The nature tourism involves travelling to natural areas. This kind of tourism is based on the natural attractions of an area e.g. camping, hiking, fishing, visiting parks, photography and hunting. For the tourists, the term "nature tourism" is uncommon and no one would tell taking a "nature-based holiday" and most of people would describe this activity as cultural tourism (Tourism New South Wales, 2014).

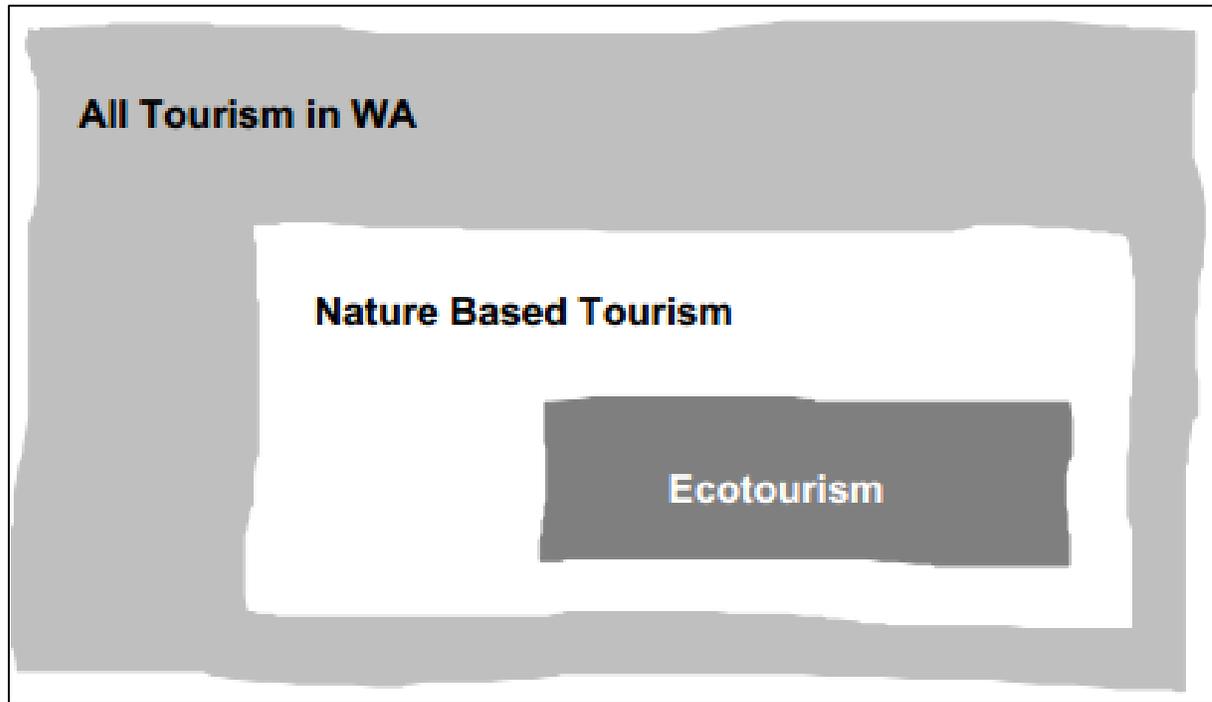
Much debate and confusion has been around the term “nature tourism” and “ecotourism”. At the first sight, they seem have the same definition, but they are neither synonymous nor mutually exclusive (Figure 2) (Tourism Western Australia, 2006).

Ceballos-Lascurain defined the ecotourism in 1983 in Mexico City. He called it as “travelling to relatively undisturbed or uncontaminated areas with the specific object of studying, admiring, and enjoying the scenery, its wild plants and animals, as well as any existing cultural manifestations found in these areas” (Cit. by Tourism Western Australia, 2006).

In other words, ecotourism is based upon ecologically sustainable visitation to natural places that encourages environmental and cultural understanding, appreciation and conservation. Ecotourism is not just visiting national parks, but also travelling to enjoy to study and to appreciate the nature, promoting the conservation, and using natural assets and resources in ecologically sensitive areas to create an once-in-a-lifetime experience to the visitor (Tourism Western Australia, 2006).

On the other hand, the term “nature based tourism” is generally used to express the adventure tourism, ecotourism, and aspects of cultural and rural tourism. As Figure 2 shows, the ecotourism is a small part of the nature based tourism (Tourism Western Australia, 2006: 3).

Figure 2: Overview of nature based tourism and ecotourism



Source: Tourism Western Australia, 2006

2.2 Destination definition

In general, a destination is the area where a tourist obtains a bundle of services. Thereby, the area can be defined as a city, village, district, holiday centre, hotel, region, country, or group of country which includes establishments for journey, activities, and recreation. The tourist chooses the destination in which he wants to stay and consume services (Bieger and Beritelli, 2013).

According to Freyer (2011), the tourist can define different dimensions of areas as destination. Kaspar (1991) states that a destination is the crystallisation spot of touristic demand which implies that touristic demand refers to a location and not to an organization. IN general, the UNWTO (1993) defines a destination as a location with a pattern of attractions such as touristic establishments and services which a tourist or touristic group chooses for a visit. This means that a destination is the location travelled to as well as a touristic product. The word destination implies all types and dimensions of locations travelled to as well as being a touristic product (UNWTO, 1993).

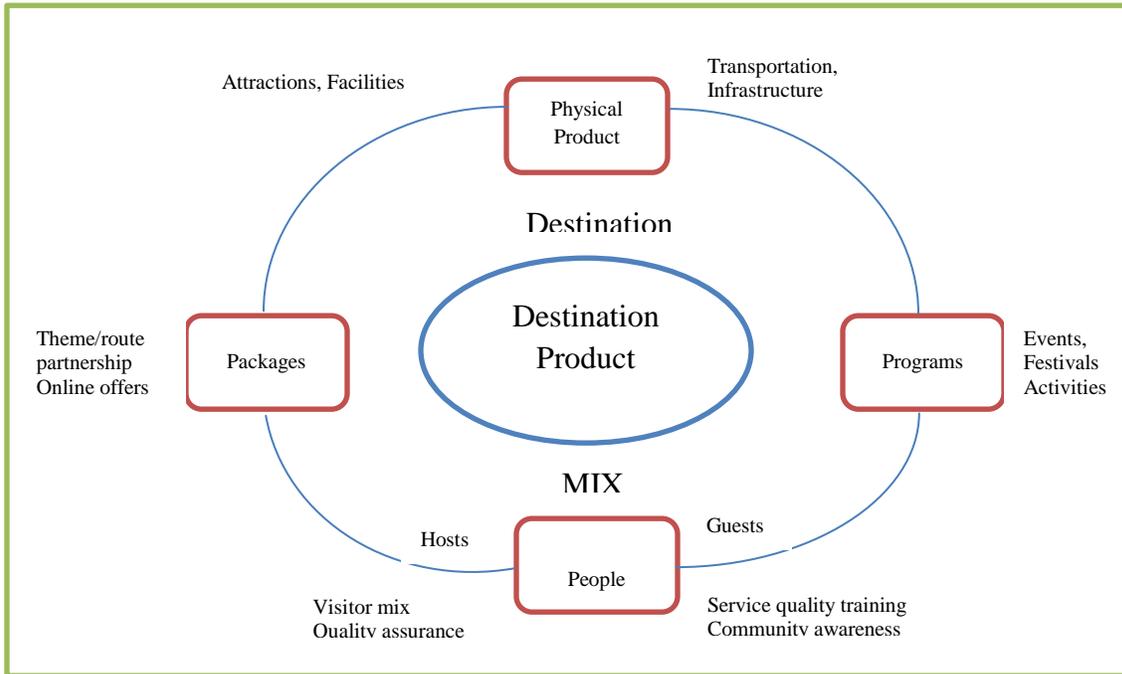
The three most important aspects of destinations are the following. A destination is defined by tourists and visitors. It depends on the needs and perceptions of the guests. For example, a golf player would define a golf resort as a destination, whereas US-Americans travelling to Europe would define the whole continent Europe as a destination. Finally, a destination offers a specific product in form of a bundle of services to the tourist (UNWTO, 1993).

2.2.1 Destination management and marketing

Destination management and marketing are the main components to develop and promote a product or a region to attract and maintain the tourists. According to Mill and Morrison (2012) destination management “is the coordination and integration of all the elements of the destination mix in a geographic area based upon a defined strategy and plan”. Destination management is comprised by branding, image, communications and marketing of all the attractions and structures of a region that are offered to tourists, while infrastructure, transportation, facilities, attraction and events represent the destination mix elements (Morrison, 2012). Kozak and Baloglu (2011), state that an efficient tourist destination management is gained by strategic management and marketing, where different techniques, principles and model are taken into consideration, and to assure a qualitative touristic experience, all internal and external stakeholders should be involved in the process of planning and implementation of the destination management and marketing strategies.

Morrison (2014) defines that destination management organizations are the entities responsible for destination marketing as well as for coordination and integration of the destination mix elements (physical products, people, packages and programs) (Figure 3).

Figure 3: Destination product and destination mix Morrison (2012)



Effective destination management organizations should have long term vision of destination development, well defined responsibilities and suitable operational structures as well as responsible and transparent decision making towards local actors of interest (Wray et al. 2010). While the role of destination management organizations are described by Morrison (2014) as leadership and coordination, research and planning, product development, marketing and promotion, partnership and team-building and community relations. Beritelli and Laesser (2011) consider that the aim of destination management organization consists from coordinating all the promotional, sales, long-term destination planning as well as fulfilling marketing strategies and management because tourists define, choose and buy a destination as a whole integrated product.

Because the destination marketing is one the crucial role of the destination management organizations, and marketing and promotion are expensive, destination marketing planning should be done professionally, step-by-step and with a systematic approach (Morrison, 2014). Buhalis (2000), considers that destination marketing should emancipate the

stakeholders strategic objectives and the sustainability of local resources for tourism impact optimization.

2.2.2 The Competitiveness of Destinations

As regarding the concept of competitiveness in literature, it is widely analyzed, especially in the context of marketing planning and competitive development strategies, since the tourist destinations are facing the continuous requirement to maintain their attractiveness (Mohammadi, Rast, Khalifah, 2010).

Poon (1993) was the first researcher to focus on touristic competitiveness. She defined four key principles which a destination should consider for becoming a competitive destination. According to her, the four main factors to follow are the following. First, destinations should focus on the environment. Second, they should make the tourism industry the leading industry in that region. Third, destinations should improve their distribution channels. Finally, destinations should build a dynamic private sector (Wei-Chiang Hong, 2008: 43).

Getz et al. (2006) state that image factors for a wine tourism destination should be viewed as the core wine product, the destinations features and appeal and the cultural experience gained by visitors. Although the wine tourism destination should be considered from the consumer side – a form of leisure and travel behaviour, the wineries – as a sale and distribution mechanism and the regions which will develop tourism linked to the wine appeal (Getz, 2000).

Hassan (2000:239) defines competitiveness as “the destination’s ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors”. Dwyer and Kim (2003: 375) are defining it as “the ability of a destination to maintain its market position and share and/or to improve upon them through time”.

Ritchie and Crouch argue that competitiveness implies the inherited (natural resources) and created (infrastructure) assets transformed into economic results (Crouch,

2007). They have also developed a conceptual model of destination competitiveness, being the best-known one, which is based on destination's comparative and competitive advantages, strongly pointing on the impact of global macro-environmental forces and competitive micro-environmental circumstances, influencing the functioning of the tourism system associated with the destination (Crouch, 2007).

Crouch has also identified 10 of the most important factors influencing destination attractiveness: (1) Physiography and Climate; (2) Market Ties; (3) Culture and History; (4) Tourism Superstructure; (5) Safety and Security; (6) Cost/Value; (7) Accessibility; (8) Awareness/Image; (9) Location; (10) Infrastructure (Crouch, 2007).

Dwyer and Kim (2003) have also developed their own model of destination competitiveness, where the first component consists of endowed resources (natural and cultural/heritage) and of created resources (tourism infrastructure, range of activities, shopping, entertainment and special events/festivals). The supporting factors are represented by general infrastructure, quality of service, accessibility of destination, hospitality and market ties. The second, distinctive element of the model comprises the destination management completed by situational conditions, demand factors and market performance indicators (visitor statistics, contribution of tourism to economy, indicators of economic prosperity, tourism investment, government support for tourism) (Dwyer, Kim, 2003).

Enright and Newton (2005) adopted a model, where the competitiveness is influenced not only by tourism-specific factors, but also by business-related factors, which in combination can strongly affect the perceptions of tourists when selecting a destination.

When talking about destination competitiveness and factors that influence it, the term of sustainability is always emerging. It is also present in the conceptual model of destination competitiveness provided by Ritchie and Crouch, who state that "competitiveness is illusory without sustainability" (Ritchie, Crouch, 2003) representing the crucial elements in ensuring the competitiveness of the tourist destination is also strongly pointing on planning combined with a sustainable development of the destination. Since tourism, like any other activity practiced by humans is affecting the environment, a professional leadership involving all the

stakeholders, basing on quality, sustainability and modernization of tourist services can serve as a great contributor to destination attractiveness (Mazilu, 2012).

Further another two definitions of tourism and destination competitiveness are given. Dwyer and Forsyth (2006: 39) define that “competitiveness is a general concept that encompasses price differentials coupled with exchange rate movements, productivity, levels of various components of the tourist industry and qualitative factors affecting the attractiveness or otherwise of a destination.” Hassan (2000: 239) states that “competitiveness is defined [...] as the destination’s ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors.”

For promoting a tourism destination, multiple factors should be taken into consideration as conclusive points for the public: relief, landscape, vegetation, geographical positioning, climate, fauna, traditions, language, folklore, hospitality, the human element, culture. Combining these factors with public and private actor’s interests, should build an efficient mechanism for development of tourists needs: infrastructure, tourism equipment, transportation and communication, food and accommodation facilities, sport and entertainment institutions (Minciu, 2000).

In this context, in order to achieve a high competitiveness of a destination on national and international levels, the governments along with the industry representatives and the whole social community should undertake serious measures in order to identify the weak and the strong elements and therefore develop a strategy, able to manage properly the resources by maintaining the competitive advantages and creating opportunities for over passing the weaknesses.

2.3 Wine Tourism

Food and wine tourism are often interrelated, and gastronomy is an expectation and a part of touristic experience, though wine tourism is sometimes confused and related to wine tasting and degustation only, it consist of much more than the sole experience of emotions and senses associated to wine (Mitchell, 2006).

Food and wine tourism is experiencing a growing demand in recent years, travelers being more and more interested in culinary destination, in Europe alone, food and wine travel demand consist of more than 600000 trips each year and secondary demand with an estimation of approximately 20 million of trips per year, and the annual growth for this sector is expected between 7% and 12% (Costa, 2012 in UNWTO, 2012).

According to United Nations World Tourism Organization (UNWTO) the international tourist arrivals are forecasted to reach 1.8 billion by 2030, increasing by an average 3.3% a year. The international arrivals in emerging economy destinations such as Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa are expected to continue growing at double the pace +4,4% a year. By 2015, emerging economies will receive more international tourist arrivals than advanced economies, and by 2030 their share is expected to reach 58% (UNWTO, 2014).

The International Organization of Vine and Wine (OIV) in 2013 Statistical Report on World Vitiviniculture, has presented data showing a decrease in world wine consumption that constitutes 238.7 mhl – a decrease of 2.5 mhl compared with previous year, because of the reduced production in 2012, in the same time positioning United States as the biggest internal market in the world in terms of volume and predicting a low wine production in the Southern hemisphere in 2014 (OIV, 2014).

Despite the significant decrease in world wine consumption, and the numerous factors affecting the economy in general, the wine tourism sector is strengthening its positions on international market.

According to UNWTO Global Report on Food Tourism, in Europe, the primary demand for food and wine travel represents 600.000 trips each year, the secondary demand is estimated at 20 million annual trips. According to tourism experts, the prospects are optimistic and the expected growth for this segment will be between 7% and 12% per year (UNWTO, 2012).

2.3.1 Wine Tourism definition

Wine tourism is a relatively recent phenomenon and is usually associated as a niche field being part of cultural tourism related to gastronomic tourism. There were multiple authors trying to define the wine tourism concept (Table 2). According to (Hall et al 2000) wine tourism already existed for more than a century, with the roots in the “Grand tours” taken by the middle classes of the United States and Europe in the late half of the 19th century, and tourists following the German wine trails from 1920’s. (Hall et al, 2002) defines wine tourism as a visitation to vineyards, wineries, wine festivals and wine shows, where grape and wine tasting together with the discover of the wine region are the determinant factors for visiting. Also he states that wine tourism implies a different range of characteristics which includes educational feature, wine and food, lifestyle experience, marketing opportunities for tourism destination which lead to the development of social, economic and cultural values of the region.

The Western Australia wine tourism strategy (2000) states that beginning with the 1950’s Wine tourism began to be referred as enotourism as a separate niche of gastronomic tourism and defines wine tourism as the travel for purpose of the wineries experience and wine regions surrounding them and their lifestyle links. And it comprises both destination marketing and service provision.

O’Neill and Palmer (2004) agrees with wine tourism concept defined by hall and further expands it by adding that wine tourism is the complexity of experiences gained by tourists in their activities related to wineries visitation, wine related shows and events or wine regions. Wine tourism may include production facilities, wine cellars, vineyards and food and wine tasting related to the visited region. The motivation of the wine tourist may be comprised from the opportunities to gain wine knowledge, to taste wine and food, to experience the atmosphere of the winery and to enjoy the culture of wine production.

Getz et al. (2006) stated that wine tourism research developed in the mid 90’s with the first wine tourism conference which was held in Australia in 1998. Getz (2000) define wine tourism as the visitation to vineyards and experience of the attributes of a wine region.

Table 2: Wine Tourism definitions

Wine tourism definition	
Hall et al. (2002)	Visitation to vineyards, wineries, wine festivals and wine shows, where grape and wine tasting together with the discover of the wine region are the determinant factors for visiting
O'Neill and Palmer (2004)	The complexity of experiences gained by tourists in their activities related to wineries visitation, wine related shows and events or wine regions
Western Australia wine tourism strategy (2000)	Wine tourism as the travel for purpose of the wineries experience and wine regions surrounding them and their lifestyle links
Getz (2000)	Visitation to vineyards and experience of the attributes of a wine region

Hudelson (2014) considers that wine tourism has greatly change in the past decades from an “inexpensive mean of brand marketing...to direct come-as-you can format...providing direct-to-customer sales by wine industries”. A concept that was commonly adopted in United States and Australia and it is becoming more and more popular in Europe.

2.3.2 Supply and Demand Sides of Wine Tourism

As every product on the market, wine tourism has supply and demand side. Getz (2000) defines the supply side of wine tourism as services, attractions, organizational development and infrastructure. Hall et al. (2000) defines the supply side as “all the resources utilize by tourists for the purpose of wine tourism and the businesses and institutions which transform those resources into a wine tourism product“. From this context results that a tourism product is a mix between wine industries and tourism, in the wider context of the landscapes and wine regions.

On the other hand demand for the wine tourism as described by Hall et al. (2000) is the “motivations, perceptions, previous experiences and expectations of the wine tourist. However Alonso et al. (2007) states that demand side for wine tourism is to study the

tourist's motivations in visiting wineries and their increasing knowledge development and further contribution to the wine tourism demand.

As in the wine tourism activity there are different involved parts, which contribute to the supply and demand formation, different conceptual models of supply and demand interaction were constructed for analyzing the interpretation of experiences that tourists demanders have while interacting with the wine tourism suppliers (Figure 4, Figure 5)

According to Hall et al.(2000) consumer behavior analysis is important for wine tourism stakeholders as it helps by providing important information into the who the wine tourist is, its behavior and motivations, allowing managers to target and develop effectively the markets. Also he states that although the research in wine tourism is growing it is relatively small comparing to researches from other service industry niches, and the focus of researches is prevalent from supply side actors (wine industries and makers) rather than from demand side (wine tourists).

Figure 4: Wine tourism system Hall et al. (2002)

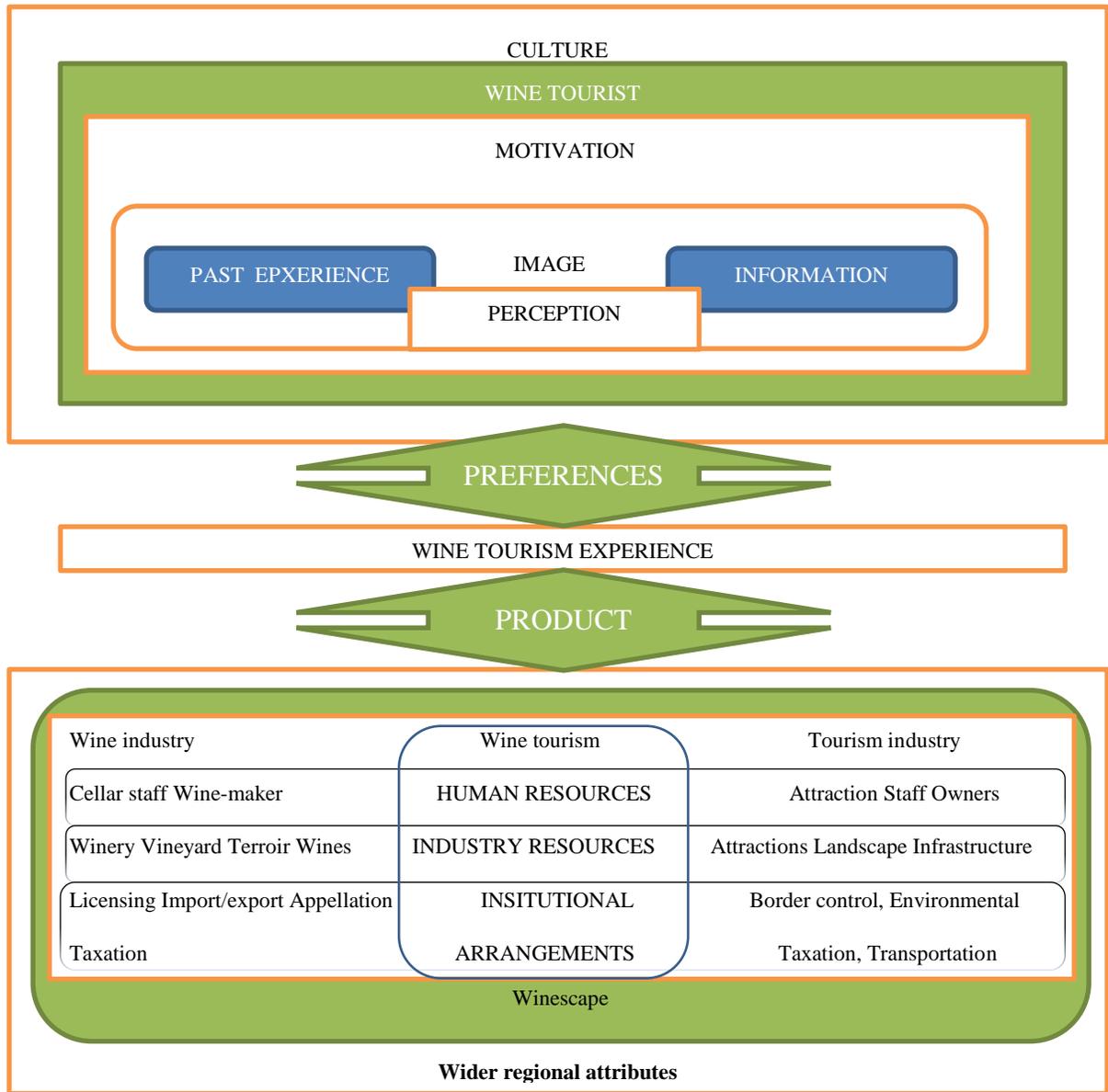


Figure 5: Wine tourism system Getz (2000)



2.3.3 Wine tourist profile

Wine tourists are the main demanding actors for wine tourism. For analyzing their behavior and motivation, several studies were held around the world to class them into different categories or in other words profiles. Several authors Getz et al. (2006), Marzo-Navaro et al. (2010) noticed the lack of the specific researches in this field, but it is plausible the increasing interest in the subject. Mitchell et al. (2000) stated that tourist main characteristic, motivations and profiles may change depending on the destination where wine tourism is held.

The most common definition of wine profile is adopted by Hall (2006) which defines wine tourist in three subcategories: wine lovers, wine curious and wine interested.

- *Wine lovers* are characterized by a huge interest in wine and winemaking process itself, and the main purpose for involving in wine tourism is the wineries destination. They are close related to wine and food industries, most of them have higher education, are mature and have a taste for regular buying and trying wine and food products, have some experience with travelling to several wine tourism destinations. They read specialized literature, most likely will visit other wine tourism destinations.
- *Wine interested* are tourist that have a big interest in wine products, but wine and food products, wineries do not consist the sole purpose of their purpose. They are also characterized as persons with middle to high income and with higher education, they are interested in wine tourism related literature and magazines. Usually they visit several wine tourism destinations and are likely to buy food and wine products.
- *Wine curious* are described as actors with moderate education and income and also moderate interest for wine products. The wineries and wine making process itself is not the main purpose of their visit, usually they have some basic knowledge of wine tourism and the destination choosing may be spontaneous as other practical factors lead their decisions (for example their visit to a region maybe a part of a general tourism route).

Another characterization of wine tourist profile (Table 3) was used by Brown et al. (2006). He considers 4 groups of wine tourist profile and describes them as 2 for men and 2 for women: Demanding gourmet and Hedonic aficionados for men and Prudent enthusiast and

Functional differentiator for women – their characteristics are analyzed in Table 4. Corigliano (1996) cited in Charters et al. (2002) have a more simplistic partition of the wine tourist profile: Professional, Passionate newcomer, Follower and Drinker. The division is based more on Italian market research profile and was based on the Hall et al. (1996) analysis (Table 3).

Table 3: Wine Tourist Profile by different authors

Author	Proposed profile	Profile description
Hall et al. (1996)	Wine lovers	<ul style="list-style-type: none"> - Huge interest in all wine tourism activities. Wine, food and wineries the main reason for visit - High education and income level - Interested in specialized literature - Most likely to buy wine related products and to visit other wine tourism destinations
	Wine interested	<ul style="list-style-type: none"> - Big interest in wine related products - Moderate education and income level - Maintain some interest in specialized literature - High probability of buying wine related products and may visit other wine tourism destinations
	Wine curious	<ul style="list-style-type: none"> - Moderate interest in wine, moderate income and moderate education - Wineries and wine products are not the main reason for visiting - Not very familiar with wine traditions, culture and destinations
Brown et al. (2006)	Demanding gourmet	<ul style="list-style-type: none"> - Men, middle to high income and education, usually self employed - Good trip and route planning - Regular wine products consumption, attend different wine related activities, try to establish friendly connections with directors of wineries
	Hedonic aficionados	<ul style="list-style-type: none"> - Men, middle income and education - Regular wine products consumption
	Prudent enthusiasts	<ul style="list-style-type: none"> - Women, middle to high income and education - Consume less wine related products than first categories, usually take pre-established trips

	Functional differentiator	- Women, retired
Corigliano (1996) in Charters et al. (2002)	Professional	- Good knowledge of wine and wine related products - Good literature and technical knowledge about wine - Interested in different activities and take regular part in them - Middle age between 30 and 35
	Passionate newcomer	- Middle to high income - Passionate for gastronomy and wine related activities - Between 25 and 30 years - Some knowledge of specialized literature, consults guides - Usually travels with friends or groups
	Follower	- Moderately to high income and education - Basic knowledge of wine and specialized literature - Attracted by famous wine brands and appearances - High income, between 40 and 50 years
	Drinker	- Visits the wineries on weekends usually in groups - Tastes wine in good quantities, buys wine in bulk - Between 50 and 60 years old

Adapted from Popp (2013)

2.3.4 Wine Routes

Wine route concept is described by Hall et al. (2000) as a tourist route which with the help of signage and leaflets connects vineyards and wineries within an area. Wine routes can be established by collaboration between vineyards and wineries to make the region more attractive to tourists, the experience is enhanced when the route is characterized with landscape attractions (such as mountains or other scenery), physical attractions (cellars, wine estates or wineries themselves) and guided through maps or markers directing the tourists to the individual wine route framework (Jago et al., 2000).

According to Merret et al. (1994) the wine route concept is the experience of introducing the exploration and discovery notion to the tourists. It involves journeys that can bring a wide range of unexpected experiences. Tourist by participating and discovering the features of a wine route gain invaluable experience of natural and cultural issues which in the basis lead to the promotion and development of the wine region where the route originates.

Bruwer (2003) claimed that the sustainable development of wine routes form and indispensable part of wine tourism industry because the wine routes are the roadways to the main attractions from the industry, wines and winery facilities. According to Olaru (2012) wine routes consist of vital concepts of wine areas, which link wine producers to the unique characteristics of cultural heritage of the area “Wine producers whose vineyards are part of a wine route ... emphasize characteristics that make them unique” and all the characteristic from grapes, landscapes, climate to the vineyards give them an unique distinctive attribute and cultural heritage Olaru (2012).

Conclusions

In this chapter was analyzed the literature review regarding tourism and wine tourism in particular. With the help of the literature was defined the role and the place of wine tourism in the tourism sector, as well as the niche market of the wine tourism and its emergence and correlation with the gastronomic or food tourism niche. Also by analyzing the destination and destination management and marketing, together with the wine tourist profile will help to analyze the situation regarding wine tourism in Moldova, the presence of the supply and demand side attributes of the wine tourism in this specific region. Also by investigating the presence or the absence of the destination management stakeholder’s implication will identify problems and opportunities for Moldova as a successful wine tourism market and destination.

Chapter 3. The Background of Moldavian Tourism

Introduction

Republic of Moldova is a relatively recently formed state, gaining its independence from Soviet Union only in 1991. However due to the military conflict from 1992, the south-east part of Moldova, called Transnistria fall apart from the main territory and formed an autonomous region.

Republic of Moldova is situated in the south-east of Europe between northern latitudes of 45° and 48° and eastern longitude of 26° and 30° on a total area of 33800 thousand square km. In the west and north it borders with Romania, while in the east and south with Ukraine, also there is the breakaway state of Transnistria at the south-east so-called border with a total area of 4,163 square km, it has direct access to the lower Danube (United Nations, 2002), (FIGURE 6).

Figure 6: Physical map of Republic of Moldova



Source. Ezilon.com, 2009

The territory of the state is mainly hilly, with a wide range of soils, predominantly Chernozom. The hydrographic network consists of 3260 rivers and small rivers, with a total

length of more than 16000 km. The main rivers are Danube, Prut, Nistru, Bic and Botna located in the Black sea basin. There are also present 3532 lakes and water basins with a total area of 333km. The climate in Moldova is temperate continental with average temperatures varying from -3,5°C in January to +21,3° in June. The climate is characterized by a relatively high number of sunny days 160-190 annually. The atmospheric flows are determined by the transition of cold air flows from Atlantic at east and wet and warm air flows from Mediterranean sea (Miron, Gututui, 2005).

The main natural hazards related to Republic of Moldova are the earthquakes, storms, floods, erosion, landslides and freeze, problems related to meteorological conditions can be defined by frequent drought in spring and summer and relative temperature fluctuations. The average annual rains are lower from the north-east to south-east, decreasing from 620mm to 450mm per year (Miron, 2006).

The population of Republic of Moldova consist of 2,913,281 as of the estimative data provided by National bureau of Statistics based on 2014 census, with a diminishing rate of 13,9% from the population census conducted in 2004. The main reason of such dramatic decrease of the population is due to the high rate of migration and political instability will all the afferent social and economic consequences from the last decade. The population from Transnistria was not taken into account in the 2014 census, because of the lack of instruments and mechanism to provide verified census in the uncontrolled region. However the estimative data for 2014 consist of 505,000 inhabitants with a decrease of 9,6% from 2004 when the population of Transnistrian region was 555,347. The rate of urbanization is 34,2% with 65,8% living in the rural area. (Statistica, 2014b; Statistica, 2014c).

The official language of Moldova is Romanian, with 84% of population declaring it as their first language, the second most spoken language is Russian, used by 16% of total population as their main language according to 2004 census (the data from the census done in 2014 is not yet available). According to nationalities, in Moldova 75,6 % declare themselves as Moldavians, followed by Ukrainians 8,4%, Russians 5,9%, Gagauzi 4,4% and others 5,7 % according to the same census from 2004 year (Statistica, 2004b; Statistica, 2004c).

3.1 General overview of tourism in Moldova

Republic of Moldova is a relatively new on world tourism map, and its offer is quite limited because the country is small and do not have important touristic attractions such as sea or mountains. The tourism industry of Moldova focuses mainly on following aspects of tourism: business tourism, wine tourism, rural tourism, treatment and medical tourism, religious tourism and cultural tourism. (Travel & Tourism, 2014). Usually the itinerary of leisure tourism in Moldova is a mix of several touristic niches: food and wine tourism, rural tourism and religious tourism.

Despite the fact that today the tourism contribution to the national economy is significantly growing from 2008 year, Moldova can be placed among the countries with underdeveloped tourism industries; however in the recent years have been undertaken significant efforts in order to redress the situation (Nebunu, 2012).

Rural Tourism in Moldova is represented by agricultural and picturesque countryside communities proposing various services for tourists: accommodation in traditional rural-style establishments, the opportunity to enjoy country pursuits and activities, familiarity with the national folklore, entertainment and traditions, familiarity with the crafts once practiced in the area and the possibility to participate in their process production, the possibility of purchasing handcraft products (Florea, 2005).

Cultural tourism is represented by the rich cultural heritage of Moldova, in total there are identified 140 cultural heritage sites of national interest, and the most notorious of them are included in the tourist circuits, as well as in the wine routes of the country. The earliest heritage are Geto-Dacian and Roman fortification, remains of medieval fortresses, archaeological complexes, cave monasteries, nobles' mansions and peasant homes. Moldova is an amalgam of nationalities and cultures, traditions, languages and cooking habits. Due to the historic activities in the territory it is a mix of Romanic, Ottoman and Slavic culture. There are around 880 folk groups, and every group apart reflecting the distinct traditions of their district and ethnic origins (Miron, Gututui, 2005).

In Republic of Moldova are present 55 Orthodox cloisters that are open to the public, also 22 monasteries and 6 cloisters for monks and 24 monasteries with 2 cloisters for nuns,

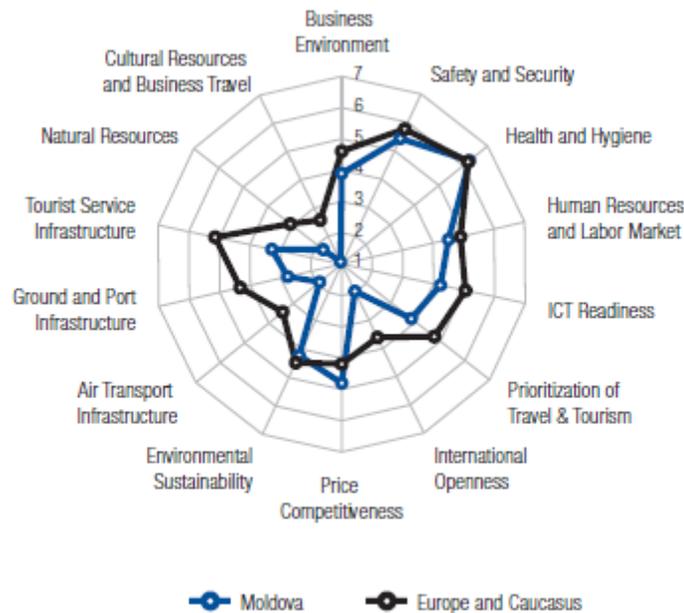
together with 1 monastery for Old-Believers this heritage form the backbone of the religious tourism in Moldova (ATRM, 2010b).

In National Tourism Strategy Development Plan for 2013-2020 years, are specified several touristic forms that may be developed in Moldova that require attention and improvement: Medical and Spa tourism (there are present precondition based on mineral and thermal waters, mud and some infrastructure left form Soviet Union); sport tourism, automobilist tourism, nostalgic tourism (based on the high number of emigrants that wish to revisit the native villages and feel the atmosphere of their descents), educational tourism (Tourism 2020, 2014).

In 2013 was registered the rise of tourism services by 1.6% in comparison to previous year. The number of departed and arrived tourists increased by 4.4% and 6.1 % respectively. The total contribution of Travel & Tourism to GDP was MDL 2.4bn or EUR 143mln* (2.6% of GDP) in 2013, and is forecasted to rise by 3.4% in 2014. Leisure travel spending (inbound and domestic) generated 55.9% of direct Travel & Tourism GDP in 2013 (MDL 3.6bn or EUR 225 mln.) compared with 44.1% for business travel spending (MDL 2.8bn or EUR 175 mln.). Domestic travel spending is expected to grow by 3.6% in 2014 to MDL 2.9bn (EUR 181 mln.), and rise by 6.3% to MDL 5.4bn (or EUR 338 mln.) in 2024. (Statistica, 2014; Travel & Tourism, 2014; WEF, 2015).

Therefore based on Travel & Tourism Competitiveness Report 2015 made by World Economic Forum, Moldova is ranked only on 111th position out of 141 analyzed countries (Figure 7, Appendix 2).

Figure 7: Travel & Tourism Competitiveness index



Source: Travel & Tourism competitiveness report, 2015 p.236

According to report, Moldova is located also on the last position from Europe (37 place), the only parameter where Moldova is above the Europe and Caucasus medium rate is price competitiveness. Also good results are presented by health and hygiene index, safety and security, environmental sustainability and human resources and labor market – close to the European median index. Unfortunately on every other parameter (natural resources, cultural resources and business travel, business environment, ICT readiness, prioritization of Travel&Tourism, international openness; air, ground and port infrastructure, tourist service infrastructure), Moldova is far behind the median for Europe, thus positioning it on the last place from Europe and Caucasus and on the 111 place worldwide (WEF, 2015). Also is to mention that based on price competitiveness, Moldova gained even more edge for tourism attractiveness, because only in the last 8 month the EUR/MDL currency ratio rose by about 11% while USD/MDL ratio increased in the same period by 27,4%, while the inflation for the stated period was of 7,8% which means more potential buying power for international tourists (BNM, 2015).

According to National Statistics Bureau (2014) Romania is the country from which the most tourists are coming with a rate of 24,4% from total international arrivals, followed

by Russia with 11,5%, Ukraine 9,7% and Germany 6,2%. How we can see from this data, the main tourist arrivals are from neighborhood countries (Ukraine and Romania) and Russia. However the number of international tourist arrival for 2014 is in small decrease of 1,8% comparing to 2013 period (till 2013 was a permanent increase from 2004 to approximately 8% per year). Therefore the number of tourist from the most countries have increased softly, the overall decrease is due to the reduction of tourists number coming from Russia with almost 25% in 2014, mainly because of the unstable political relations with Ukraine (NSB, 2014b).

In the 2014 year the number of tourists accommodated in the collective tourist accommodation establishments grew by 4,2% comparing to 2013 year, while the flow of tourists and excursionists which used services of tour operators have increased by 16,2 %. Yet, although the number of tourists accommodated in the collective tourist accommodation establishments exceeded the 2008 numbers by almost 1% (due to the growing influx of foreign tourists – over 25% compared to 2008), the number of overnight stays scaled for only 88% of the 2008 year (NIER, 2014).

The Moldavian tourism sector is facing several challenges. The decrease in the number of internal tourists by 10.6% in 2013 is indicating that the internal market is negatively affected either by lack of sufficient finances resources, either by the lack of a strategy oriented towards the attraction of domestic tourists. In the context where the domestic tourism is a major contributor to the economy – an increased effort towards its development seems to be the most indicated measure. (Statistica, 2014).

3.2 Institutional framework of tourism of Moldova

For understanding the evolution and the development of tourism sector in Moldova, first of all should be considered the evolution of the institutional framework and the implication of the state in the regulatory process.

According to (ADTM, 2011 and Tourism Agency of Republic of Moldova) there were observed 3 main periods of the development of institutional framework of tourism management in Republic of Moldova:

The first period can be considered the period in which the state had the only role of observer of the touristic phenomenon (is present especially in the first years after the independence of Moldova 1990-1994). For the first 4 years of independence 2 institutions undertook the general coordination tasks of the tourism sector:

1. State Department of Tourism of R.S.S. Moldova (Moldavian Soviet Socialist Republic – as the name to Moldova was changed only in December 1991)

- Creation of the International Association for exchange and tourism of R.S.S. Moldova “Basarabia Tur”

- Formation to the National Tourism Association “Moldova-Tur”

- Privatization of public property

- Uncertainties regarding the principles of Moldavian properties in Ukraine and Rusiia and vice-versa.

2. The Ministry of Youth, Sport and Tourism was created in 1992 (1992-1994)

- The subordination and integration of the National Tourism Association “Moldova-Tur” created 2 years earlier

- The apparition and the first licensing of the tourism enterprises

- The first statistical investigations in tourism (1992)

- Privatization of public properties

The second period could be characterized as the period in which state has abandoned the management of the touristic sector (1995-1999). One of the branches of Ministry of Economy was responsible for managing the data for the evolution of touristic sector. In this period was elaborated a concept of tourism development till the year of 2005 and the project

for the first law in tourism was developed. However, from the proclamation of independence in 1991, till the adoption of the tourism law nr. 798 from 11.02.2000, there was no basic legislation governing the tourism sector. Which determined essentially the uncertainty of the institutional and functional structures of the tourism sector at all levels.

The third period is determined by the acknowledgement at state level of the importance of management of the tourist sector as the disastrous results of non-implication have left their consequences on the whole touristic sector. This period is called the institutional strengthening with the foundation of the National Tourism Authority (2000-present), as a direct result of the need for the state and government to take direct coordination control of the touristic sector. The national authority also started the implementation of national and international standards in the field as well as the coordination of the development of the domestic and outbound tourism.

1. National Tourism Agency (2000-2001)

- The implementation of the UNDP project “Sustainable development of Tourism in Moldova”

- Development of the special foundation for tourism development and promotion (2001)

- Marking of the first touristic routes

- The development of the first specialized web resources and Moldavian logo

2. The Department for Tourism Development (2001-2005)

- Development of the Strategy for Sustainable Tourism Development (2003-2015) – replaced with the Strategy of Tourism Development “Tourism 2020” in 2014 due to ineffectiveness

- Creation of the National Center for Continuous Tourism training and elaboration of the methodological norms of quality for tourism personnel

- Elaboration of national classification system in tourism (accommodation and catering establishments)
- Implementation of collaboration with the national statistics bureau for improving the statistical data
- Joint development with other national ministries of the national programs “Moldovian Village” and “Wine Routes” 2004

3. The ministry of Culture and Tourism (2005-2009)

- Drafting and implementation of the new tourism law in 2006
- Operating the agency of national touristic zones management, operating the Tourism College and Tourism Advisory Board
- Elaboration of new tourism routes and creation of the commission for boosting tourism development in rural areas (ADTM, 2011; ATRM, 2015).

In present days all the operations regarding tourism coordinated by the state are the responsibility of the Tourism Agency of the Republic of Moldova (ATRM). The agency has the mission to develop and implement the legislative and regulatory framework, strategies and state policies on tourism as well as protection of rights of legal relations subjects in tourism and ensuring the provision of tourism services to international standards (ATRM, 2015).

3.3 Advantages of tourism in Moldova

Since the independence of the republic of Moldova (1991), the tourism sector was considered, although confused, a perspective field with several multilateral effects: economic, social, of intercultural cooperation both in the West and in the East, but according to (Miron, Gututui, 2005; Miron 2012) the sector has not been sufficiently coordinated for a long period which led to its development according to the rules of liberalized market. Sometimes entire frames of touristic aspects of Moldova were left to the self-regulatory environment, from which according consequences occurred.

With the implementation and the approval of National Strategy for Tourism Development “Turism 2020” plan by the National Tourism Agency and the Government of Moldova, was conducted an important work for assessment and evaluation of the current state of the tourism in the country as well as were made proposals for perspective development of the sector. The Association of Tourism Development from Moldova made a report with consultancies and proposals regarding the National Strategy plan. After consulting the report, together with the information from other sources (Turism 2020, 2014; Miron, 2006; Rosca, 2010) I have identified the advantages and problems of the tourism in Moldova.

ADVANTAGES: - The Evolution of institutional framework. From the foundation of Tourism Agency, the tourism sector is managed only by one state institution directly subordinated to the government with own specialized college and is assisted by the general council of tourism, which increases the overall quality of the providing services.

- Promoting investment. In the past years, the tourism sector becomes interesting for national and international investments due to the simplified regulatory framework in Moldova, favoring the development of service businesses. Important investments came from Turkey, Russia and European Union. Turnover in the tourism sector is constantly increasing from 2008 year, by approximately 3-5% per year.
- International collaboration. In the past 10 years Moldova made efforts to create and maintain international touristic partnerships. The Tourism Agency represents the country in 4 multilateral agreements and manages 23 bilateral agreements signed with countries which generate the most international visitors. Tourism Agency also permanently participates in tourism fares from Russia, Romania, Great Britain and Germany.
- Construction and development of tourist reception establishments with functions of accommodation and catering. In Moldova at the moment are 264 of collective tourist accommodation structures with a total of 34214 of places, with an increase of 48% from 2008, when till that year the accommodation sector suffered a decline. There were provided 2300 new job places and the accommodation sector revenue have doubled. Also in the past 10 years 53 new 3-5 star hotels were established and 97 conference rooms.

- Development of web resource. With the increase interest towards tourism sector from private and public stakeholders, the web resources are developing accordingly, only in the last 4 years the web domains regarding tourism in Moldova have increased with more than 230%, improving the international awareness towards the country, facilitating the tourist services and increasing the overall attractiveness of the destination.
- Development of education. Within last 10 years 5 new departments with tourism inclinations were established in the higher education institutions of Moldova, with an overall capacity of 450 places per year. Also they offer courses of specialization, re-specialization and intense training to the already existing employees form tourism sector.
- Development of rural areas and uniform distribution of development. Due to the increase attention to tourism sector from domestic and outbound tourists, the government began to share funds to all 4 strategic regions of Moldova, there were built and rebuilt 400km of new roads to rural area, with the help of public and private stakeholders were rehabilitated and preserved more than 18 churches and monasteries and more than 800 anthropogenic sites of cultural heritage, more than 200 of them were passed into state protection areas.
- Domestic tourism market development. According to the Agency of Tourism the domestic tourism market were rehabilitated regaining its lost position during 1991-2004 years, especially by development of the summer accommodation units for children and promoting the tourism activity on internal market. The revenues from domestic tourism market have increased from 2,39 mln. EUR in 2003 to 9,43 mln. EUR in 2013, and the median revenue of touristic agencies from domestic tourist/day have increased from under 6 EUR in 2003 to over 21 EUR in 2013.

3.4 Problems of Tourism in Moldova

As stated by (Miron, 2006, Certan, 2014, respondent B and D) the disadvantages of tourism activity for Moldova were not researched at the national level, and the available data have only local character describing certain companies or branches, It will be more appropriate to describe the problems related to the tourism activity in Moldova.

Because Moldova is a relatively new independent country, considered the poorest country in Europe and the desired attention to the tourism sector from the government started only some 10 years ago, there is a very wide range of problems and uncertainty in the tourism sector as well as in the other spheres of Moldova.

First of all, during my research and in agree with (ADTM, 2013; Tourism 2020, 2015; respondent D) in Moldova there is no Tourism Satellite Account system implemented, which makes difficult to evaluate the real numbers of tourism activity, also making the available data confusing. Different sources are using different numbers for evaluation of the international touristic activity in Moldova (Appendix 3). For example in table 4, according to National Statistics Bureau, in 2014 there were 14362 of foreign arrivals of visitors in Moldova through travel agencies and tour operators. This number is used as default for determining the number of International tourists in Moldova by Tourism Agency, Strategic plan for tourism development 2020 and by the popular internet resource Wikipedia, however the numbers of foreign tourists in collective tourist accommodation structures, for 2014 year, was 93897, and is used as default by World Economic Forum in Global Travel and Competitiveness Report 2015 for determining the international touristic activity in Moldova, and none of them is analyzing the information from the Moldavian customs, where only for 2012 year, the number for foreign citizens entrance in the country was over 2,2 million.

Table 4: Number of foreign visitors and foreign tourists in Moldova

<i>NUMBER OF ARRIVALS OF FOREIGN VISITORS IN THE REPUBLIC OF MOLDOVA, THOROUGH TRAVEL AGENCIES AND TOUR OPERATORS</i>							
	2008	2009	2010	2011	2012	2013	2014
Total	8710	9189	8956	10788	12797	13150	14362

<i>NUMBER OF FOREIGN TOURISTS IN COLLECTIVE TOURIST ACCOMMODATION STRUCTURES</i>							
	2008	2009	2010	2011	2012	2013	2014
Total	73288	59563	63593	75000	88956	95640	93897

SOURCE: Statistica, 2014d

By analyzing (ADTM, 2011; ADTM, 2013; Tourism 2020, 2014; Certan, 2014; the interview data) the following problems of the tourism sector of Moldova were determined:

- Insufficient management of tourism sector at national level (Tourism Agency is relatively recent and there were no sufficient institutional stability, very weak

- statistical data for accounting and evaluating the touristic movement in Moldova, nontransparent decision making and fund sharing by Tourism Agency).
- Elaborated tourist legislation is not fully implemented (several national development plans and strategies were canceled or replaced due to inactivity or lack of results; unfair and nontransparent division of intermediaries for implementing the legislation; often conflicts and contradiction between different approved laws and strategies; weak control of the results for approved legislation)
 - Infrastructure and accessibility problems (infrastructure in Moldova is in very deteriorated condition, no road marks and signs; weak access points to touristic objects; not all the areas are covered by paved roads or railroad; fleet of buses is obsolete and with random schedule; very poor quality of hospitality of the transport personnel; almost absent public transportation to the touristic destinations out of the towns, only 1 airport in the capital city with relatively few connections and diversity of operating lines)
 - Tourist attractions and places of interests weakly developed (few heritage objects are valued as tourist attractions and/or introduced in travel itineraries; many cultural attractions are in advanced state of decay; unenriched monuments are totally ignored; tourists attractions visibility and aesthetics in poor condition; lack of entrepreneurship (boutiques, souvenirs, crafts) and tourist information offices; touristic staff is not well trained and lack of language skills)
 - Lack of active promotion of the country (till 2014 year in Moldova, was almost zero international marketing of tourism; lack of sufficient financial resources for promotion; dubious spending of allocated resources; almost inexistent production and distribution of promotional materials and touristic brochures or maps).
 - Low offer and management of rural tourism (reduced or unequipped accommodation in rural establishments; rural tourism business run semi-legal; unimplemented opportunities and projects for more than 10 year; poor hospitality quality and unfair prices; poor knowledge of heritage value by the touristic staff; lack of investments in rural infrastructure; limited or inexistent access to information about local events; lack of touristic facilities near attractions).

Chapter 4. Wine tourism. Case study Moldova

Introduction

According to UNWTO Global Report on Food Tourism, in Europe, the primary demand for food and wine travel represents 600.000 trips each year, the secondary demand is estimated at 20 million annual trips. According to tourism experts, the prospects are optimistic and the expected growth for this segment will be between 7% and 12% per year (UNWTO, 2012).

The history of wine in Moldova starts in 3000BC, the first vines were recorded on the territory near 7000 years BC. History suggests that wine in this region was utilized as an exchange medium as well as a desired trophy after fights, which with the time made this product a national Moldavian art.

The development of the wine industry continued till the Ottoman Empire invasion in XV century when the wine production was banned. The production resumed in 1812 with the annexation of the territory to the Russian Empire. In 1914, in Basarabia territory (Moldova - nowadays) there was the biggest vine plantation from the Russian Empire. Events from the World War I and II erased almost completely the wine industry in Moldova, however during 50s-60s there was conducted a large scale campaign for revitalizing the sector and in mid 60s total area planted with vines amounted 220 thousands hectare. In the next 20 years, Moldova was the biggest supplier of wine production from the Soviet Union (Wine, 2014).

In mid 80s Moldavian wine industry was hit again, by the alcohol prohibition campaign promoted by Gorbachev (Chetrari, 2003), but with the independence proclamation from 1991, the wine industry was subject to mass privatization (the industry was in deplorable condition and there were no available budget funds to revitalize it (Jolondcovcschi, 2001) and the private sector started to develop and improve the situation in the wine sector. Considerable investments in vines plantations were made in 2000-2005 period, when many wineries with the support of government and international funds (Certan, 2014, interview data) decided to plant clones of popular European vine sorts. In 2007 Moldova cultivate 156,4 hectares, of which 96% were private (Colesnicova, Iatisin, 2014).

4.1 Wine tourism in Moldova

As stated by (Aseri, Patti, 2009) “small, developing countries that don’t possess a wide range of tourist attraction resources” can use wine, wine-production territories and other related activities as main attraction that in combination with other rural and nature based attractions can shape an attractive offer able to generate a tourist flow (Asero, Patti, 2009).

According to OIV (Figure 8), in 2011, Moldova was on the 13th place worldwide on areas under wines in major wine producing countries.

Figure 8: Areas under vines in major wine producing countries (1000ha)

	2008	2009	2010	2011	Var. 2011/2008
Spain	1165	1113	1082	1032	-11.4%
France	857	836	818	806	-5.9%
Italy	825	812	795	776	-5.9%
China	480	518	539	560	+16.6%
Turkey	518	515	514	508	-1.9%
USA	402	403	404	407	+1.2%
Portugal	246	244	243	240	-2.3%
Iran	232	232	239	238	+2.8%
Argentina	226	229	217	218	-3.6%
Romania	207	206	204	204	-1.5%
Chile	198	199	200	200	1.2%
Australia	173	177	171	170	-1.3%
Moldavia	150	148	146	143	-5.0%
South Africa	132	132	132	131	-0.8%
World Total *	7674	7633	7594	7517	-2.0%

Source. OIV, 2014 pp 9

There is observed a decreasing tendency from 2008 to 2011 by 5%, the main reason for this was the ban of Moldavian wines on Russian market from 2006 and 2008, where the export only to this country constitute 72% of total Moldavian wine production exports (Tourism 2020, 2014).

In 2012, Moldova has exported wine related products with a total revenue of 124,2 million EUR, with an increase of 23% from 2011, which results that the market is reviving from the crises of Russian import bans. The most significant part for Moldavian export remain the CIS

market with a share of 75,4%. Comparing to 2010 year, the volume of wine related countries in CIS have increased with 20%, in EU with 4% and in other countries with 89% (Stiroi, 2013). Thus Moldova is diversifying its export markets for securing the export potential of wine related products in cases of other crises on old markets.

In the present, the wine tourism in Moldova is spread within 4 regions (Figure 9) according to the wine industries specifics and the development regions of the wine industry sector. In 2013 year there were 175 wine factories and processing plants, of which 16 declared that they have enough experience and facilities to offer touristic services. According to (Tur, 2013)

BALTI region and northern territories is popular for the production of bulk wines and strong alcoholic beverages. It is composed of 9 administrative areas with 571 settlements from which 551 of rural establishments. Touristic potential consists of 102 places of state protected areas with a total surface of 16,6 thousand hectares, 2 beaches of national importance (Prut and Dniester rivers), 20 museums and 178 religious cultural heritages of national importance and 578 of local importance. Wine industry is composed by 28 wine factories and processing plants with 6 micro zones for wine production (ADTM, 2012). This region is crossed by 1 national wine route (Chisinau-Balti) and 3 Monastic routes (Calarasi, Tipova-Saharna-Dobrusca and Curchi-Cosauti) (ATRM, 2010c).

CODRU and central region is located in the central part of the country and has fragmented relief of valleys, dales and many small rivers, the oak and linden forests comprise 25% of the territory, influencing the microclimate of the region. With 11 administrative area containing 579 settlements and the capital city if Chisinau, there are 114 state protected territories with an total area of 38,5 thousand hectares, 26 museums, 256 religious cultural heritages of national importance and 27 of regional importance including the only national park from Moldova "Orheiul Vechi". Wine tourism is characterized by 85 wine factories and processing plants making it the most developed region of wine tourism with 52 500 hectares of vines and 40 micro zones for wine production, 2 of the biggest vineyards from Moldova (Cricova and Milestii Mici) are located here. All of the national wine routes and monastic routes are crossing the region. (ATRM, 2010b; ATRM 2010c; WineofMoldova, 2014).

VALUL LUI TRAIAN and southern territories are characterized by forest steppe plains and plateaus, with aerated soils. There are 11 administrative areas containing 43 state protected zones with 10 museums and 63 religious cultural heritage places of national importance including the remains of two Traian

Figure 9: Wine Tourism Regions of Moldova



Source: WineofMoldova, 2015

Walls that protected the Roman Empire from barbarians. The region is crossed by 4 wine national wine tourism routes and 1 monastic route. Wine tourism is provided by 36 wine factories and processing plants with a total area of 43,230 hectares of vineyards with 36 micro zones for wine production, also 65% of the production of red wines is concentrated here (ADTM, 2012; WineofMoldova, 2014).

ȘTEFAN VODA and southeastern regions are wine regions situated at a low altitude, which includes Dniester terraces. There are present 5 administrative regions containing 19 state protected areas with 14 museums and 58 religious cultural heritage places of national

importance and 12 of regional importance. Wine tourism is provided by 26 factories and wine processing plants with 15 thousand hectares of vineyard with 3 micro zones for wine production, also here is located the famous Purcari wine yard. The region is crossed by 4 national wine routes and 2 monastic routes (ATRM, 2010b, WineofMoldova, 2014).

There are no defined numbers or statistical data available for international tourist participating in wine tourism activities in Moldova (Certan, 2014), data accounted by Tourism Agency based on information provided by National Statistics bureau relates that the total numbers of tourists end excursionist for the 2014 year (domestic and international) was 57407 persons. But how was discussed in Chapter 2, this data regards only the tourism organized by travel agencies and tour operators. However the data made public by the major wine yards from Moldova which offer tourism services (only a total of 4 establishments provide data regarding visitors (ADTM, 2014), the annual number of tourists visiting these wineries are accounted to more than 75000 thousands (Stiroi, 2013), however the information regarding international tourist is presented only by 1 company and consist 8000. This number can be considered more appropriate for identifying the estimative number of wine tourist activity in Moldova.

The respondents A, B, C from the interviews declared that wine tourism and tourism activities make part of their business, and all of them have different services and facilities for offering to the tourists. Respondent B was the most focused on expanding and further developing the tourism side of the business by creating new accommodation facilities in near future as it plan till the 2018 year, tourism side activity to consist around 6% of the total revenues of the company.

As of the advantages, every respond confirm that wine tourism in benefic for them and for their production, however they were more focused on the existing problems and barriers perceived in the tourism side of their activity. Most of the mentioned problems were the same as the problems identified and discussed in previous chapter (poor infrastructure and low international awareness of the destination was rated among the highest problem by all 3 respondents), followed by corruption (respondent A and B), low attention from the government and specialized agencies to the real needs of the tourism sector (Respondent B,

C) Respondent D argue that the main problem is the lack of necessary funds for implementing all the desired procedure and the imperfection of legislation.

4.2 Wine tourism within National Strategy for Tourism Development

National Strategy for Tourism Development “Turism 2020” is the main tourism strategy developed by the government of Moldova in collaboration with the Tourism Agency and Association of Tourism Development in Moldova with the support of USAID CEED II program. The objectives of the strategy are to define the actual situation of the tourism sector in Moldova, past evolution of the sector and priority actions for tourism development to the year of 2020 (Turism 2020, 2014; CEED, 2014).

The strategy was developed to replace the previous Strategy for tourism development 2003-2015 abolished in 2012 by the Moldavian government due to revealed problems and ineffectiveness. According to (ADTM, 2014) the problems related to the old strategy were the inconsistency of actions, broad interpretation of strategic plans and lack of adequate resources for financing the proposed objectives.

The new tourism strategy have the role to ensure the sustainable development of the tourism industry in Moldova, to provide an optimal framework for the development of different sub-sectors of the industry, to provide and apply a decent system of performance monitoring and implementation and to encourage the country’s competitiveness as a tourist destination (Tourism 2020, 2014).

Wine Tourism, together with the rural, cultural and ecological tourism are considered the main attractions of Moldavian tourism, based on a survey conducted by CEED program in 2011-2012 years to identify the international visitors satisfaction by visiting touristic attractions from Moldova (Tourism 2020, 2014; Appendix 4).

The authors of the report identify that the main problem of the wine tourism in Moldova is that the most forms of touristic attractions related to wine tourism are underused by economic agents and that its potential is insufficiently exploited and promoted on both domestic and international markets. However it is specified that wine tourism and the wines from Moldova

will consist the main image of the country in international market projects developed by the state for promoting Moldova (these programs will be discussed in section 5.5) (Tourism 2020, 2014).

By inspecting the main actors from wine tourism industry and according to interview data, several problems were identified in their activity: first of all is the lack of promotion strategies of the wine tourism by the private stakeholders – as their main economic activity consist wine production;

- reduced capacity to offer service to all the tourist and low professionalism of the interacting staff
- huge gap of offered services at quantitative and qualitative level between the main wine making companies
- lack of promotion of offered services (organized and individual) towards the visiting tourists
- reduced flexibility in agenda and schedule in the offered touristic packages for different categories of tourists
- lack of business expansion projects of wine tourism
- questionable quality of catering services
- adjacent and complimentary territory of the wine yards and vineyards is of low quality and underdeveloped
- underutilization of the potential of the touristic activity

The following measures were proposed for implementation for improving the situation (some of them were mentioned by respondent A, B, C and all of them by respondent D):

- to make group and individual seminars explaining the benefits and advantages of wine tourism promotion at national and international levels
- in cooperation with CEED II project to make periodic surveys identifying the needs and satisfaction of the tourists
- to cooperate with major wine tourism actors to make marketing activities towards wine tourism promotion

- to develop and maintain existing specialized e-resources promoting the image of the country and wine tourism in particular (also to offer consultancies to the wine companies in developing their own internet resources)
- to implement specialized courses for the existing staff for improving the quality of offered services (language courses, management and marketing) by private-public partnerships
- to strengthen the state control towards economic agents to evaluate the quality of services (catering, accommodation, facilities)
- to strengthen the control of provided services and facilities when granting tourism activity licensing

Towards the improvement of the wine tourism potential, Tourism Agency was delegated to improve the existent wine routes plans and maps till the end of 2015, as the existing one are considered outdated (further discussion on this topic in section 5.4). To elaborate new wine tourist guides and promotional materials in international languages (English, French, Spanish, German, Russian) as the data base of existing ones is very low or outdated. Also was proposed to organize conferences for economic agents to encouraging the development of touristic activities in rural and wine tourism sectors (with international specialists). The more active participation in international tourism fare events and conferences with the participation of the national economic agents is another strategy proposed in the tourism development plan. (ADTM, 2014; Tourism 2020, 2014, respondent D).

All the proposed objectives as well as progress evaluation, as stated in the plan, should be monitored by Tourism Agency and non-governmental organizations related to the development of tourism in Moldova. Also the USAID CEED II program will delegate their own representatives for monitoring the objectives accomplishments (ADTM, 2014).

The respondent A, B, C are saluting the implementation of the new strategy, however respondent A and B remain sceptic towards the achievement of the propose objectives, as both of them remarked “that is most likely that the most important part will remain on the paper”, respondent C mentioned that the most important thing is “to take the necessary lessons from the failure of previous action” (touristic development plans). Respondent B and C suggested that the role of wine tourism is underestimated in the development plan and

more attention is passed on the more complex framework of rural tourism, yet respondent A said that it was accorded much more attention than ever, and he will be happy if all the stipulated objectives will be completed “at least by 60%”.

Respondent D (implicated directly in the elaboration of the strategy) mentioned that there was made a fundamental and critical work without precedent for our country by the means of efforts and funding for the elaboration of this project (several times was mentioned the importance of CEED II program). He states that an analytical work was conducted for analyzing the reasons of failure of precedent plans and the proper conclusions were submitted to the responsible organization to improve the legislation as well as the actions were defined much more directly to the actors that are responsible for implementation of the strategy. Also it was mentioned and saluted the support received from the wineries in elaboration of the plan, but also stipulated that there will be “much more controls and inspections” regarding the quality of the provided touristic services from the wine tourism suppliers.

4.3 Wineries and underground cellars

As described by (Hall et al., 2000), the supply side of the wine tourism industry may be all the resources provided by the tourism industry to meet the customer demand, it includes but not limited to the built environment (wine tours, wineries, accommodation establishments, restaurants), industrial component (marketing of tourism destination and wines, wine festivals and fares, legislation), natural resources (vineyards, grapevines). In this chapter I will analyze 3 most notorious wine tourism suppliers from Moldova: Cricova, Purcari and Milestii-Mici. Also these 3 stakeholders hold the biggest market share of the wine tourism from the country, biggest share of produced and exported products (Colesnicova, Iatisin, 2014), biggest underground cellars and represent the visit card of Moldavian wine tourism.

4.3.1 CRICOVA winery.

Figure 10. Cricova Wine Cellars



Source: www.beautiful-eastern-europe.blogspot.pt

The history of Cricova winery is correlated with the contemporary history of Moldova. In 1952 the limestone mines near Cricova village were transformed by the government into wine cellars and the Cricova company was created. In this way the Cricova winery obtained in its possession a huge underground wine city, the galleries which present ideal conditions for the production and storage of wine (Florea, 2005, respondent A). The total length of Cricova underground cellars has a range of over 120 km, and the oldest galleries date from 15th century (Cricova, 2014). These natural galleries are located at a 35-80 m depth and have the average of 7 meter width and 3,7 meters height with year round constant temperature between 10-12 C degrees and 97-98% humidity. In this underground city, there are roads and boulevards with their own name based on the wines that are stored there (ex. Cabernet, Sauvignon, Aligote), even a traffic light, the tours through cellars are made by cars and electric trams. The winery is the only enterprise from Moldova producing sparkling wines according to the classic French method “Chamenoise”. In 2003 to the winery was conferred national cultural heritage title, and in 2004 the Order of Republic was entitled for “substantial contribution to the economy of Moldova”. In 2008 the company implemented the ISO 9001 system and in 2009 the ISO-22000 Food Safety Management system (Cricova, 2014, respondent A).

Figure 11: Cricova vineyards



Source: www.timpul.md

In 2012 the winery registered sales of other 14 million bottles of wine and annually the management is planting around 60 new hectares of vines. Collectible and quality Cricova wines have won more than 120 medals and prizes in international contests, and there are reported around 25 thousands visitors per year from which over 8000 international tourists (Cricova, 2014; ATRM, 2010b, respondent A).

In the underground cellars of the Cricova winery also is stored its own collection of more than 1 million of wine bottles and in the underground cellars there is stored permanently around 30 million liters of wine (WineofMoldova, 2014), and is the store place of one of the biggest private collections of wines (famous people that have own private collection of wines here: Jean Marie Aurand – OIV Director, Vladimir Putin – President of Russian Federation, Angela Merkel – Chancellor of Germany; Joe Biden – Vice President of United States; Alexy II – Patriarch of Moscow and all Rus’, Yuri Gagarin – first man in space, also had his private wine collection here, nowadays it is displayed in Cricova’s museum and others) (respondent A; Cricova, 2014).

The tourism services that are provided by the Cricova company consist of following: wine tasting, guides through vineyards, production process and underground cellars,

accommodation and food and beverage services, at-door sales, history and thematic presentation and conferences, 2 museums of wine and history of wine. It has 5 conference rooms and 7 tasting rooms, 2 restaurants and 1 café, 14 rooms for accommodation and 8 villas for renting (Cricova, 2014, respondent A).

Regarding the future plans of the company, respondent A, mention that they are more focused on developing the vineyards and production lines rather than new investments in tourism side of the company, however it mentioned that is much more important to promote the exiting services and attractions, as there is enough “to see for 10 times more tourists” than the company is receiving so far. It was not concerned regarding accommodation of the tourists, as how it was suggested; the neighbors from Cricova village have enough private hotels, hostels and accommodation to fulfill the demand.

4.3.2 PURCARI winery.

The Purcari winery was founded in 1827 by the special decree signed by Russian Tsar and already in 1878 the Purcari wines were awarded the first gold medal at World Exhibition in Paris. Purcari wines are considered the striking elite wines of Moldova, being among the most appreciate by the world experts (Rosca, 2008), the Purcari’s “Negru de Purcari” and “Rosu de Purcari” wines are selected, among others, by the Regal Family of Great Britain for Royal consumption since 1990 (Chetrari, 2003, respondent B).

Figure 12: Purcari vineyards



Source: www.purcari.md

The modern history of the company start with 2003 year, when it was handover to private proprietorship and an overall modernization of the factory and vineyards was held. From 2003 the wines were awarded with more than 80 medals at national and international wine contest, and the wine underground cellars are considered the oldest from the country (which were initially designed for wine storage) (Purcari, 2014). The favorable natural conditions and the proximity of Nistru river, offer ideal conditions for vineyards, also the region is located only at 50 km. from Black Sea (however Moldova does not have direct access to the Black Sea). (ATRM, 2010a).

The vineyards of Purcari consists of more than 350 hectares of vine and the most used grapes are Cabernet Sauvignon, Rara Neagra, Pinot Noir, Chardonnay, Saperavi. The production of the company is limited to no more than 500 thousands bottle a year, for maintaining the elite designation of the wines (Colesnicova, Iatisin, 2014).

Figure 13. Purcari wine cellars



Source: www.purcari.md

One of the main tourism attractions of Purcari winery is the old Purcari mansion dating back to 1827 with the foundation of the company, the annual tourist visits are accounted to 22 thousands. The winery also proposes 2 restaurants, 8 luxury accommodation rooms, 3 banquet rooms and 2 conference rooms. Till the end of the year 2 new family villas for rent should be available, as at the moment there are in construction. The company also offers guided tours through vineyards and mansion; historical, cultural and wine traditions

presentations; wine and food tasting; at-door sales; as well as organization of cultural and family events (folk groups, weddings). The main terrace of the mansion can held events of up to 250 people and for satisfying the needs of the customers, on the territory were built 2 tennis courts, a playground for children and 2 small lakes. The company also offers transportation services with guided tours to the nearby surroundings and to the wine and monastic routes. (Purcari, 2014, respondent B).

Respondent B mentioned that the objectives of the company are to maintain the highest quality of the products and to actively focus on promotion. As he mention, from 2010, there was put a lot of effort in marketing strategies and advertising campaigns (creation of the new marketing department, new web site in several languages, and new daughter-companies with the sole role to develop and promote tourism activity with the main company's attractions). Also was mentioned the new "Purcari academy" which offer specialized courses in wine making process and specialized sommelier courses with the best professional from the country.

4.3.3 MILESTII-MICI winery.

Milestii-Mici winery was founded in 1969 as a specialized storage for wine and wine products of the factory-state farm (sovhoz) "Moldova". The first wine stocks were brought in 1970 and the results were beyond expectations, as the climate conditions from former limestone mines (the same as in Cricova galleries) were very good for wine storage: the depth of the galleries are 40-85 meters with constant temperature of 12-14 degree C and relative humidity of 85-90% year round (Turcov, 2001).

Figure 14: Milestii Mici wine cellars



Source: www.milestii-mici.md

The total length of the underground wine cellars are of more than 200 km, from which more than 55 km of galleries where technological processes are carried, with other dozens of kilometers for wine maturation, storage and preservation, making it together with the Cricova wine cellars, one of the largest in the world. The total capacity of wine storage of the cellars is of more than 65 million liters (Milestii-Mici, 2014; respondent C). The Cricova's "Golden Collection" is accounted by Guinness World Records as the largest wine cellar in the world by number of bottles – with more than 2 million bottles, a big part of them dating from 70's mid 80's (Guinness, 2014) – making it a unique touristic attraction out of the competition.

The tours and guidance through the cellars are made by visitors transport, or by electrical busses provided by the Milestii-Mici, as there are more than 50 streets with own names and even traffic rules.

Figure 15: Milestii Mici vineyards



Source: www.imperatortravel.ro

Company wines have a total of more than 80 medals and awards at different national and international wine contests. The tourism services provided by Milestii-Mici comprise guided and non-guided tours through vineyards and cellars, as well as through surroundings and the Wine and Monastic national routes of Moldova. It offers to customers in-door sales, 2 conference rooms, wine and food tasting from 2 restaurants. The winery however does not provide accommodation, over-night stays or other types of facilities and tourist attraction (Milestii-Mici, 2014). This may be explained that the company is state owned and the management is not interested in the valorization of the true touristic potential of the holding, the main activity of the winery being the production and realization of wine and alcoholic beverages. In accordance with (Florea, 2005) Tourism side of company's activity is seen as a secondary effect and it most part is left on self-development.

The interview with respondent C, confirmed the statement that the tourism side of activity is seen more as secondary and there are not allocated the necessary attention and development to develop its true potential. The respondent mentioned that many projects and suggestions were developed and proposed for implementation, but they did not receive the necessary support from the boards of directors and were not implemented. From the implemented services were mentioned the acquisition of electrical cars and trams for underground cellar visits which provide sustainable development of the tourism activity, and that till the 2020 year, there is a project in the discussion to cooperate with private investor for construction of

accommodation facilities and for developing different tourist services and attraction. From the main assets that attracts tourist are of course the underground cellars, the vineyards and the quality of wine.

4.4 Wine roads in Moldova

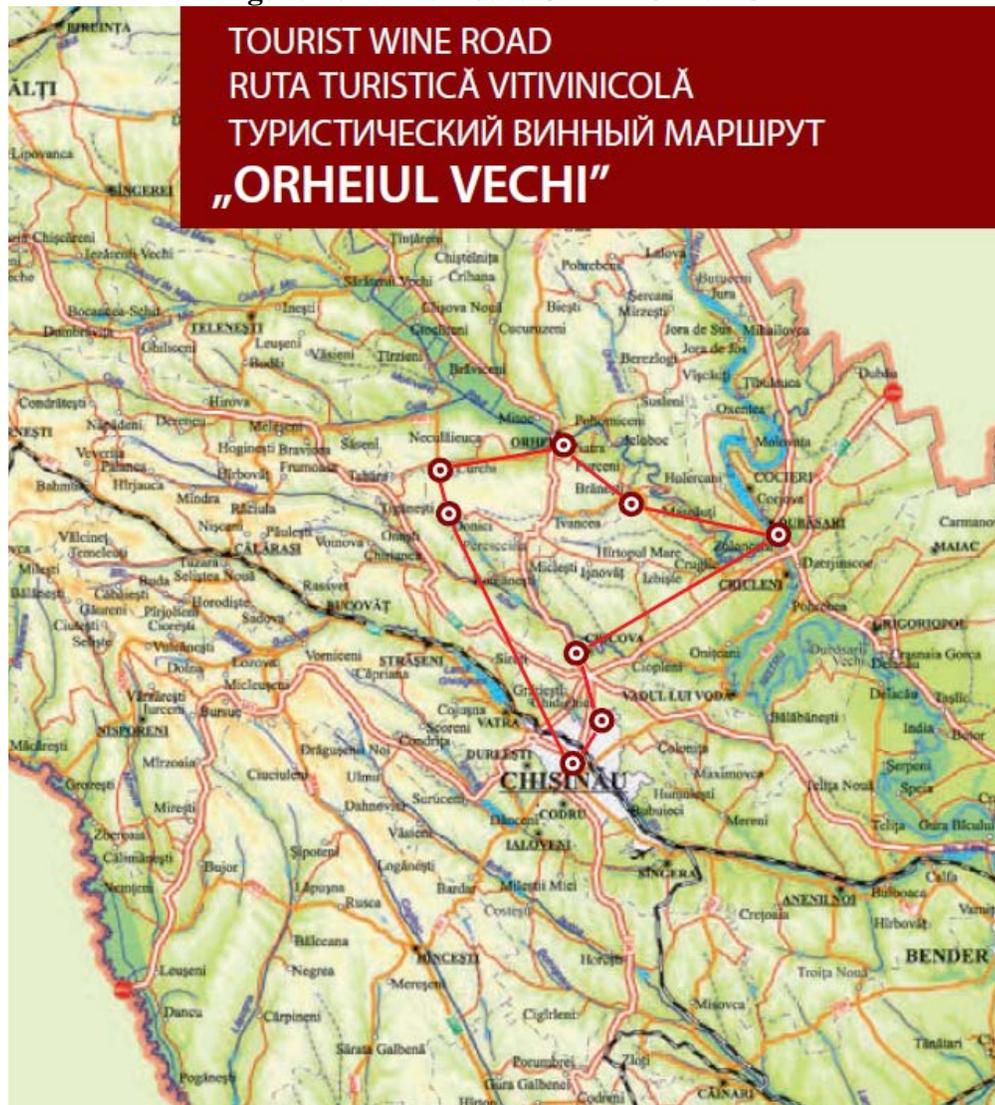
Wine routes in Moldova (Drumul Vinului) have a tradition of nearly 20 years, almost from the beginning of the development of wine industry and tourism in Moldova from the post-Soviet period. Wineries, cultural and rural tourism stakeholders have tried to attract tourists by mixing the existent attraction into specific routes and paths for providing better entertainment (Mindru, 2010). The official national wine routes in Moldova were established in 2002 by Department for tourism development (nowadays Tourism Agency) with a total of 4 wine routes, with the objective to increase the development of wine tourism sector, to increase overall attractiveness of the sector and to promote Moldova as a touristic destination among international visitors (Tur, 2013).

As (Miron, 2006) stipulates, the wine routes program did not achieved its main goal, mostly because of the lack of qualified management for implementing it and the existed self-regulatory situation on the tourism market in that days. Private stakeholders (tour operators, tourism agencies, private guides etc.) were promoting with the newly formed brand Wine Routes a very wide range of tours and paths (usually guided by own interest and contracts (Mindru, 2010)) that in most cases had nothing in common with the official wine route proposed by the state. In this way, as quality of the provided services was often dubious and the proposed service were scattered, the routes did not gained popularity neither among international nor domestic tourists (ADTM, 2011).

In 2008-2009 there were approved 7 new Wine Routes with better legal framework and management, and in late 2009 they were officially approved as national wine routes (ATRM, 2010a). Although in Tourism Strategy Development Plan for 2020, the existing wine routes are declared obsolete and Tourism Agency received the proposal to review and update them till the end of 2015 year (Tourism 2020, 2014) in this section I will analyze briefly the existing official wine routes.

Wine Route ORHEIUL VECHI.

Figure 16: Wine Route ORHEIUL VECHI



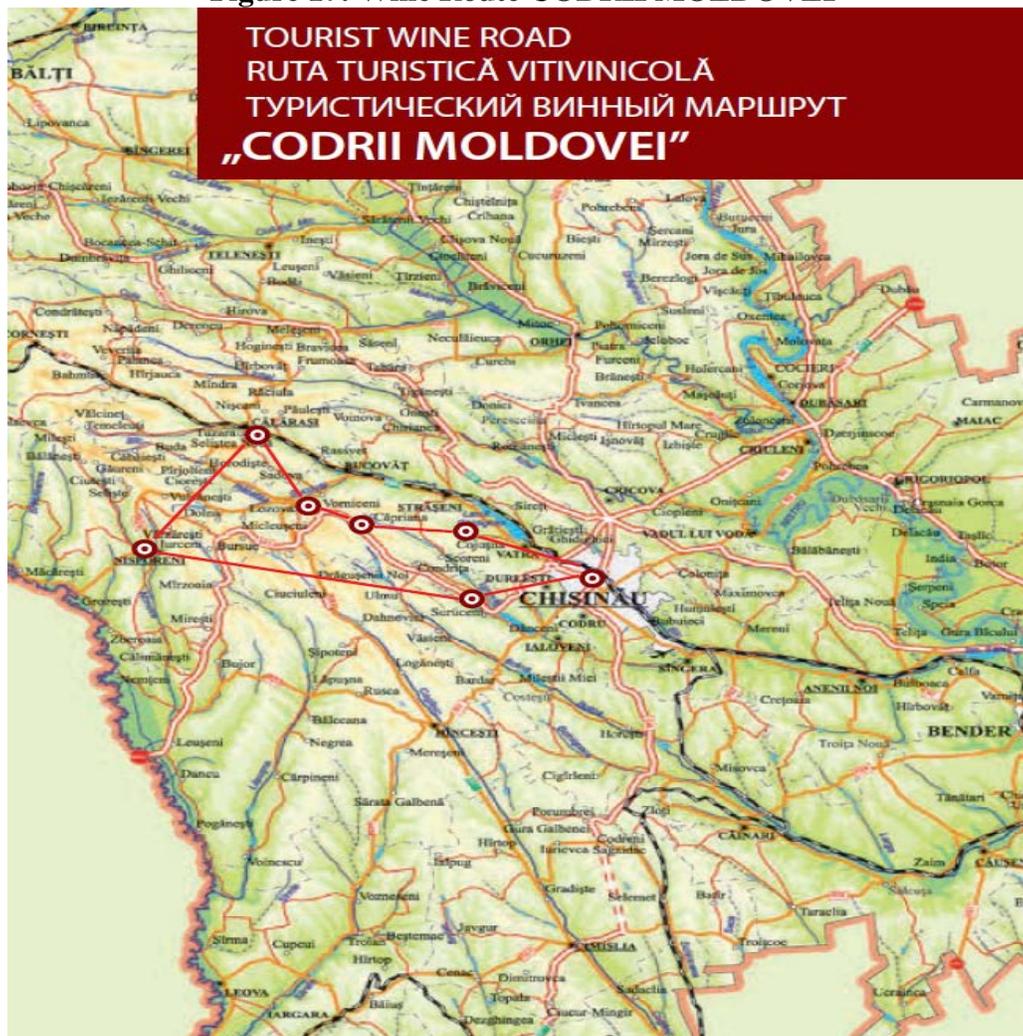
Source. ATRM, 2010a pp 10

In ORHEIUL VECHI wine route, tourist can explore the National Viticulture and Vinification College from Stauceni village, Branesti winery and its cellars, Wine processing plant Buchetul Moldovei, Wine factory and winery Cricova and its underground village with wine cellars, Chateau Vartely winery and resort and Orhei town. Also in the route there are 6 churches and 1 monastery, The Pestera rocky skete with bell tower and stone holly road. Moreover, 2 manors dating from XIX century and 2 house-museums can be explored as well as Trbujeni-Potarca Citadel in Orheiul Vechi, cave complex with runic inscriptions in

Butuceni Village and 3 popular craftsmen areas: Anaglyphic center in Branesti village, craftsman's village of Trebujeni (wood engraving, traditional paintings, husk hang manufactures and traditional musical instruments handcraft), also vine plaiting and hand weaving in Butuceni. The length of the route is 193km and the proposed time for this route is 1-3 days (ATRM, 2010a; Mindru, 2010).

Wine Route CODRII MOLDOVEI.

Figure 17: Wine Route CODRII MOLDOVEI



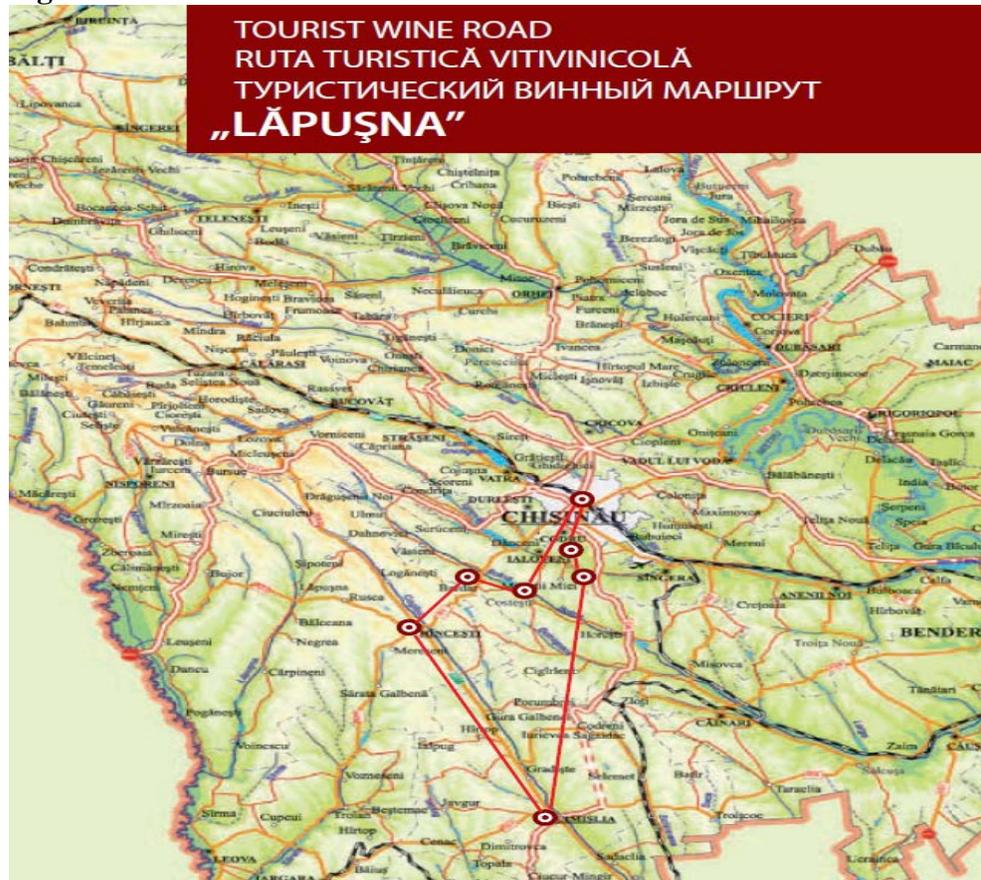
Source. ATRM, 2010a pp 16

CODRII MOLDOVEI wine route offer the Nis-Struguras winery and alcoholic beverage factory from Nisporeni town, Calarasi-Divin winery, Cojusna winery and Cojusna village. Other attractions are scientific reserves Plaiul Fagului and Codru, Capriana forestry, village

and lake Ghidighici, 7 monasteries and 1 house-museum manor. Craftsmen in this region offer cine plaiting and icon painting in Nisporeni town, embroidery in Lozova village and vine plaiting and potter's craft in Iurceni village. The lengths of the route is 169 km and the proposed activity time is from 1 to 3 days (ATRM, 2010b, Mindru, 2010)

Wine Route LAPUSNA.

Figure 18: Wine Route LAPUSNA



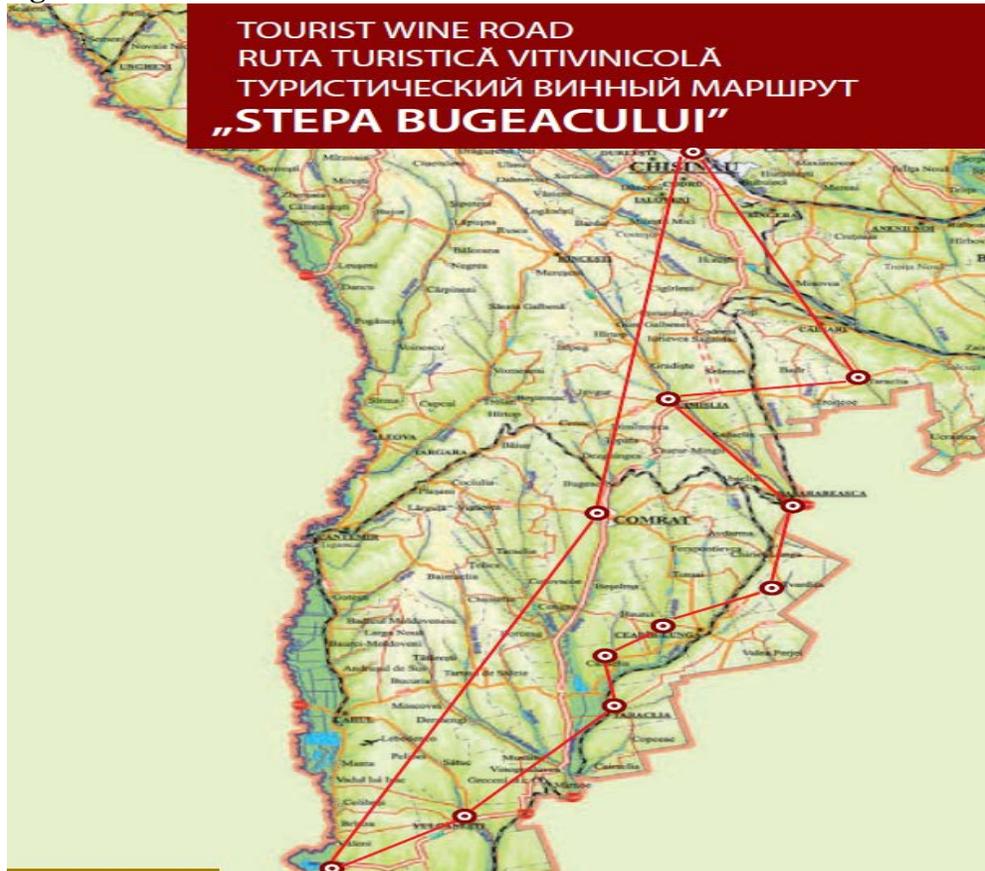
Source. ATRM, 2010a pp 22

LAPUSNA Wine Route offer to its potential visitors Bardar winery and village, Vitis-Hancesti winery and cellars in Hancesti village, Cimislia alcoholic beverage processing plant and museum, Vinuri-Ialoveni winery and Milestii-Mici winery, vineyards and underground city with wine cellars. Other proposed attractions are Padurea Hancesti forestry and landscape reserve, Molsti natural park, 1 monastery and 3 churches, peasant houses with wooden columns sculptures from XIX century, Manuc-Bei manor complex and Milestii-Mici

windmill. The length of the route is 151 km and the proposed time for considering is from 1 to 3 days (ATRM, 2010a, Mindru, 2010, Tur, 2013).

Wine Route STEPA BUGEACULUI.

Figure 19: Wine Route STEPA BUGEACULUI

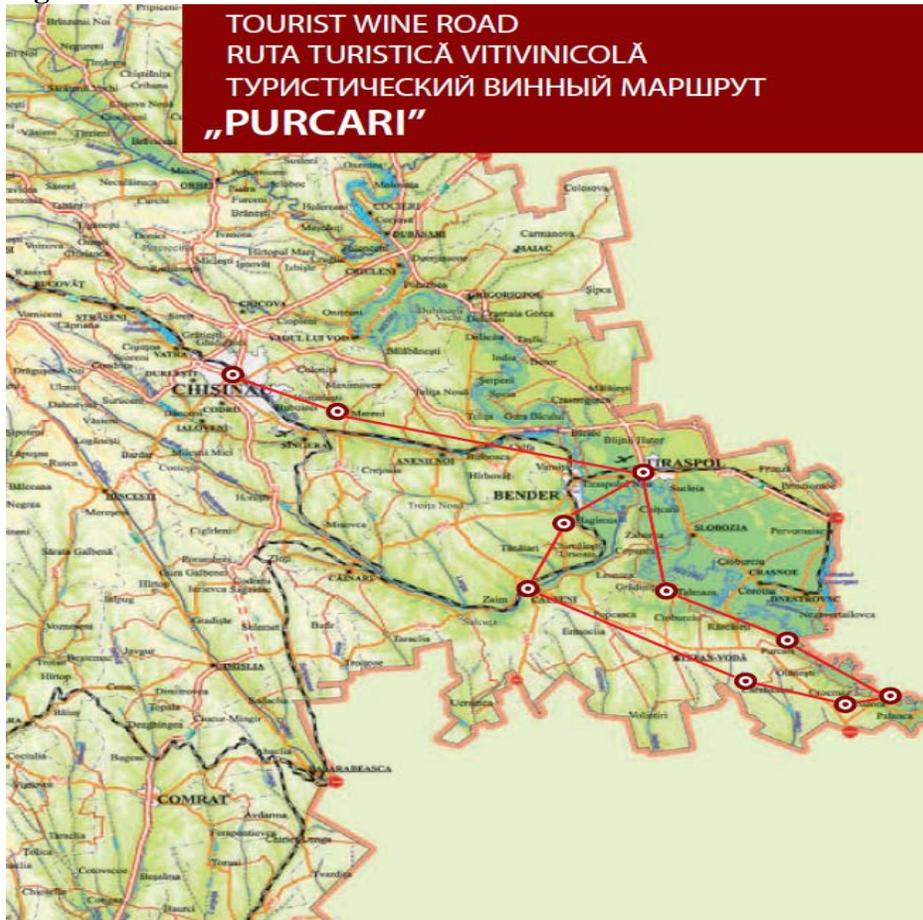


Source. ATRM, 2010a pp 26

STEPA BUGEACULUI Wine Route is designed for offering Taraclia winery and wine processing plant, Aur-Vin winery in Vulcanesti town, Corten village and winery, LW-Invest winery and Basarabeasca town, WiImpex wine processing plant and vineries in Tvardita village, Cazaiac-Vin winery and cellars. Other attractions consist from Prutul de Jos Scientific reservation, Ceadar-Lunga coombs geological and paleontological monuments, Codrii Tigheci landscape reservation, 1 monastery, 3 churches and St. Mihail and St. Dumitru Cahtedrals, 4 museums, 2 memorial houses and 4 manors as well as different craftsmen products offered in the route's villages. The total length of the proposed path is 560km and the proposed visit time varies from 2 to 6 days (ATRM, 2010a, Tur, 2013).

Wine Route PURCARI.

Figure 20: Wine Route PURCARI

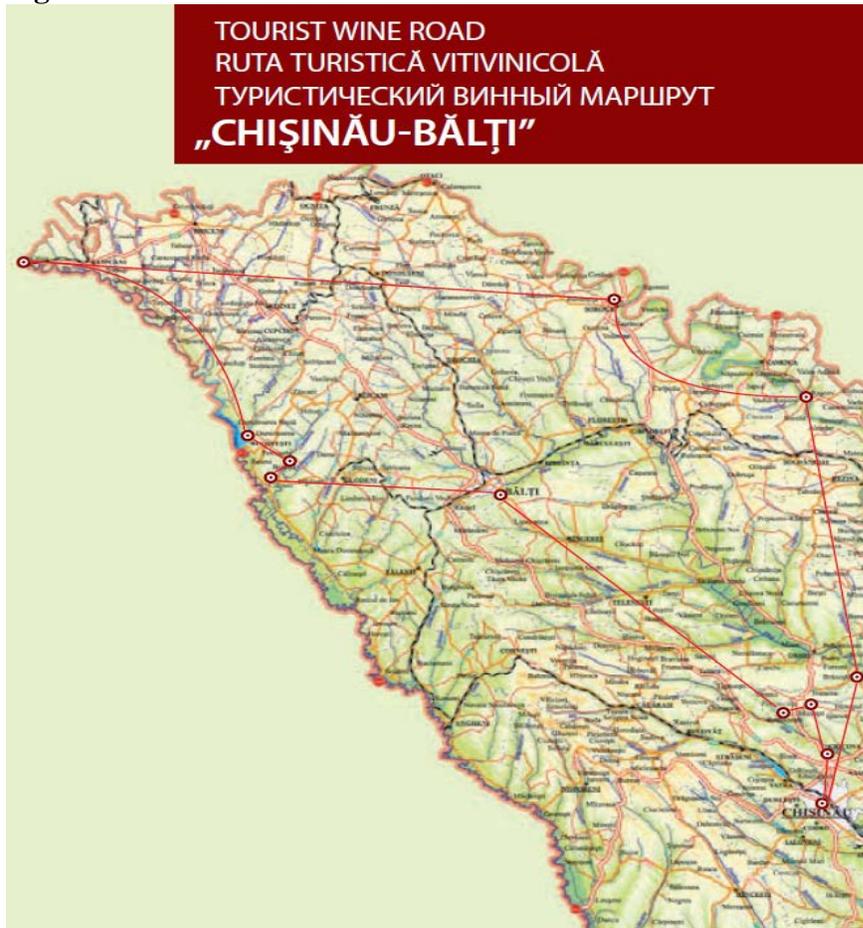


Source. ATRM, 2010a pp 34

PURCARI Wine Route offers the visit to Purcari village, winery, vineyards, resort and underground cellars, Dyonysos-Mereni winery and vineyards, Carahasani-Vin winery, Tudora-Vin winery and Talmazza vineyards and winery. Also in the tour is proposed the visit to the KVINT strong alcoholic beverage factory and Ampelos winery and farm. From other attractions worth mentioning are Misilindra natural forestry reservation, 5 churches and 1 monastery, 5 museums, 2 manors, Upper Traian Wall remains, 2 windmills and several monuments and peasant farms and houses. The length of the route is 324 km and the proposed visit time is from 2 to 4 days (ATRM, 2010a, Mindru, 2010).

Wine Route CHISINAU-BALTI.

Figure 21: Wine Route CHISINAU BALTI



Source. ATRM, 2010a pp 40

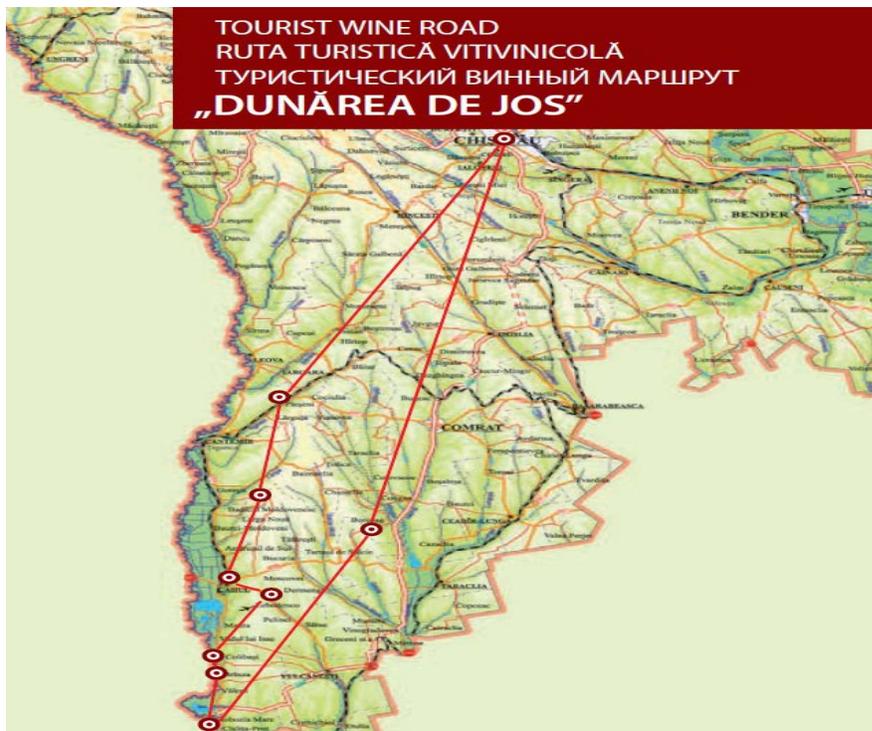
CHISINAU-BALTI is the longest wine route proposed by Tourism Agency with a total length of 661km. It starts in Chisinau capital city with the proposed visits to Lion-Gri and Vismos wine factories and processing plants, Aroma alcoholic beverage factory and continues with the visit to Cricova village. There is the Cricova winery, vineyards, underground city and wine cellars as well as Cricova-Acorex winery in the same village. Romanesti village and winery, Barza Alba alcoholic beverage complex with vineyards are also proposed. From other attractions are mentioned Padurea Domneasca natural park and scientific reservation with manors, Costesti Stanca lake, Suta de movile natural monument and landscape, Prut Reefs “Toltrele Prutului” (about 200 km length), other 5 scientific reservations and natural monuments, 5 churches, 2 monasteries and 3 Cathedrals. Also there

are offered the visits to several more manors, peasant farms, 2 cultural-historic complexes, museum and craftsman fairs and location. In Soroca village is proposed the regional museum and Soroca Fortress (which was reopened after 3 years of renovation in May, 2015 (Publika, 2015)). The Wine Route path suggest about 4 to 8 days of visiting time to experience all the listed attractions (ATRM, 2010a, Mindru, 2010, Tur, 2013).

Moldova in April 2015, organized for the first time International Wine Forum on its territory with the participation of the Danube basin countries and Organization of Black Sea Economic Cooperation under the auspices of the World Tourism Organization. At this forum was negotiated with present members, the opportunity to include several wine routes or major attraction into international wine route promoted by foreign agencies and the Wine Route of Europe, which nowadays is actively developed and promoted in Romania (TV7, 2015).

Wine Route DUNAREA DE JOS.

Figure 22: Wine Route DUNAREA DE JOS



Source. ATRM, 2010a pp 46

DUNAREA DE JOS is the last Wine Route listed by the Tourism Agency with a total length of 496 km and proposed visit time of 3 to 6 days. It consist of the visits to Imperial-Vin winery and Pleseni village, Podgoria Dunarii vineyards and winery, Grape Valley winery and processing plat, Prut winery and wine cellars, Slobozia Mare winery and alcoholic beverage factory. From other attraction is to mention Prutul de Jos scientific reservation and forestry, Beleu Lake and Cahul village, 2 churches, 2 monasteries and St. Arh. Mihail si Gavriil Cathedral, several house-museums and museum, peasant farms, Traian wall remains. Also it is a wide variety of craftsmen's services along the route. The route ends with a visit to Nufarul Alb Health resort complex (in reconstruction at the moment, estimative finish time mid 2016) (ATRM, 2010a, Tur, 2013).

According to interviewee D the wine routes in Moldova provide a great attraction for domestic and international tourist, however in the new elaborated tourism development strategy for 2020 they will be subject to changes, as many attractions are considered outdated, while to many others was improved the infrastructure towards them and their appeal for tourism demanders. Regarding the propose to expand our wine route and to integrate them with Romanian ones and to promote in combination with already well-known European ones, respondent mentioned, that discussion towards this issue are held for more than 10 years with foreign partners but with no specific results till now, however it hopes that this year the parleys will result in implementation of at least 1 newly developed wine route in cooperation with Romanian National Tourism Agency which will greatly increase the appeal of wine tourism in Moldova, as Romania is a more known destination and it has much more tourists.

Respondents A and C look optimistic into development of common wine routes with foreign partners, as stated by respondent A "our offer is not worse, with some features even better, but less promoted", and both of them consider that wine routes could greatly promote the image of the country on international level: "wine and wine tourism in our country have such traditions and culture that even Bacchus would like to spend here a weak" said respondent C. Respondent B however looked more sceptic to the combination of wine routes, and argued that is more suitable to improve and promote our own wine routes and the gained benefit will

be more valuable as this will promote Moldova as a brand and will make the destination more unmistakable.

Chapter 5. Promoting Moldova through wine tourism

In 2013 Moldova was declared by popular tourist resource Lonely Planet “The second off-the-beaten path destination in the world”, remarking that it is the least visited destination in Europe, with beautiful landscaped and unique wineries. (LonelyPlanet, 2013). Moldova have made attempts to promote itself as a tourist destination for almost 2 decades (Miron, 2008), proposing different approaches and strategies for increasing attractiveness of the country and to rise tourist awareness regarding the destination (Miron, 2006).

Wine tourism as a crucial tourism sector for Moldavian promotion was identified in as long as 2003 year (ADTM, 2011), however ineffective management of institutional framework, poor marketing and lack of finance lead to most of the initiative to remain on proposals status or to achieve unimportant successes (Tourism 2020, 2014). Moldova have all the necessary natural and industrial resources for development of wine tourism sector (climate, wineries, vineyards, culture, traditions (Certan, 2014) and by adopting efficient marketing strategies it can attract new tourist and improve the image of the country (Miron, 2006).

The adoption of the new Tourism Development Strategy 2020, opens new borders for action for the tourism stakeholders, however the past experience of failure of the previous strategic plans should be taken into account (ADTM, 2013).

As all of the interviewee agreed that Moldova lack on the promotion side and the tourism sector is highly affected by the lack of international awareness towards the country, all of them mentioned that state and institutions responsible for tourism promotion should take more active and professional attitude in raising the country’s recognition on international market. Respondent D stated that within the new development strategy there are several new promotional tools that will be used to increase international awareness towards Moldova (Moldova Holiday project, commercial spot – discussed later in this chapter). Also was stated the effectiveness of national festivals and wine days which attract and entertain increasing numbers of tourist each year.

Also it was mentioned that wine tourism and wineries from our country constitute an invaluable asset that have proved themselves as an efficient tool to promote Moldova on international tourism market as of an survey made in cooperation with CEED program

showed that tourist remained very satisfied of the experience gained. Wine tourism assets from our country are intensely used in the new promotional project that will be soon applied, therefore it is also suggested that most of the private stakeholder from wine tourism industry do not understand very well the potential of the wine tourism development and promotion and do not take organized actions in applying these tools.

Respondents A, B and C responded positive to the question if wine tourism can contribute to the increase of international awareness towards Moldova. Respondent B mentioned that a lot of tourists that are visiting his company have tasted its products prior to arrive in Moldova, Respondent C mentioned the numerous international fares and exhibitions where Moldavian wineries participate and the good feedback towards their products proved by medals and nominations. Also all the respondents were impressed by the new projects developed by Tourism Agency (Moldova Holiday, commercial spot). Respondents B and C mentioned the importance of the Wine of Moldova project (analyzed beyond) and the cooperation of the ANCC agency.

Respondent A and B have mentioned the creation of Federation for Tourism Promotion form Moldova in 2013 as a perspective organization which already has organized 2 tourism fares where both companies had participated. All the respondents consider that national festivals are a good tool for promoting wine tourism as they are gaining increasing tourist arrivals after the participation in them.

Respondent A and B agreed that the most popular season for wine tourism is summer and autumn, and stated that their companies have taken actions to extend the period in which wine tourism can be attractive: respondent A have active participation in ‘winter holiday in Moldova’, ‘rural life’ and ‘Christmas tale’ festivals and events; respondent B stated the services and attractions that are offered by its company for attracting and entertainment tourist all year round. Respondent C does not have special services or activities to cover the low season of wine tourism, but argues that with more private-public partnerships a good result can be achieved, as the company receives many guests in low season from the tourist visiting neighborhood attractions and events.

Respondent D also mentioned that more than 90% of tourists which visited Moldova with leisure purpose have visited at least 1 winery and more than 70% of total tourist number (indifferently of the their visiting purpose) have also visit at least 1 winery from Moldova (information was based on data provided by the CEDD II program survey conducted in 2011 and 2012 in the Chisinau airport with the departing foreign visitors – as stated by respondent D).

Further I will analyze international practices of wine tourism marketing based on several cases and after will be analyzed several existing and newly introduced promotional activities that have the role to promote Moldova as a tourism destination through wine tourism.

5.1 International practices of wine tourism marketing

As stated by (Hall et al., 2002), despite the fact that wine tourism was approached and developed in different ways across the world, the advantages of wine tourism and promotional tools are more or less common, but, however there are no concrete elements for benchmarking different approaches. Marketing approaches from several different countries were analyzed for studying the results and the intersection points with the promotional tools used by Moldavia stakeholders.

France for example, is one of the world leader in tourism industry with wines and wine tourism quality well recognized among international tourists (Hall, et al., 2002) According to (Waller, 2006) viticulture sector provides around 20 billion Euro in revenues annually with more than 500 thousands employees.

Wine tourism was being massively developed starting with 1950 with the introduction of the first wine route of Alsace (Waller, 2006) and in 1980 with the “Wine crisis incident” when industry started to lose territory against emerging markets, the accent was put on mass promotion of wine tourism in cooperation with wine industries to increase the sales and revenues gained by tourism activity (Hall, et al.2002). According to (Mitchell, et al., 2000) the success of wine tourism in France is based on strong cooperation between wine producers and tourism organizations that led to an effective promotion of provided services: starting with attractive signage outside wine cellars, developing of wine guides and special touristic routes to national thematic journals, magazines and festivals. Different fairs and exhibitions

also were developed and held annually to promote the awareness of wine tourism services among tourists.

As described by (Mitchell et al., 2000, Waller, 2006) the development and promotion of wine routes (Alsace, Champagne, Bordeaux etc.) contribute not only to the wine tourism development, but also to the development of secondary services related to wine tourism activity (better personnel, development of infrastructure in villages and cities covered by wine routes, better quality and new establishments of accommodation and food and beverage elements). However the role of authorities is described as supportive with no active involvement by (Hall et al. 2000), but based on the success factors of French wine tourism (long tradition in wine industry, leading position in world's tourism destination, strong brand name of French wines) together with strong promotional tools (development and promotion of wine-related attractions, promotional of small wineries and vigneron, qualified staff, exhibitions and media promotions) led to the diminishing of effect of "Wine Crisis event", increase in sales by winemakers, post-visit sales and also to long-term loyalty development of the wine tourism which increased the images and awareness of the wine making regions.

Italy is also one of the top world tourism destinations, gaining its popularity by the vast diversity of cultural attractions and historic heritage (Presenza et al., 2010). Wine tourism is strongly related to rural tourism and attractions and covers almost all the Italy's territory (Romano et al., 2009).

Wine routes were for the first time introduced in 1993 by local tourism organization (Movimento Turismo del Vino) and nowadays constitute around 140 different wine routes across the country, however not all of them are profitable and acknowledged (Presenza et al., 2010). The coordination and development of the wine tourism in Italy is made by the Movimento Turismo del Vino with the help of different non-governmental organizations and small wine making firms (which are accounted to more than 900) (Gatti et al., 2003). The main promotional tools used are festivals and events, promoting Italian wine and cuisine tradition and culture, development and implementations of a wide variety of tourism-oriented guides and journals (Romano et al., 2009). In coordination with other private and public stakeholders are taking actions in promoting wine tourism through international fairs, local

exhibitions and seminars (including those organized especially for tourists) and strong promotion via internet resources and media (Presenza et al., 2010, Romano et al., 2009).

The local authorities have an active role in development and promotion of wine tourism in Italy. For increasing the international awareness and satisfactions of wine tourism experience, Italy is focusing on the quality of offered touristic services, development and promotion of rural tourism (which is strong correlated with wine tourism), and strong cooperation with small vineries and wine making companies for increasing their participation in the marketing projects developed by national organizations (seminars, fairs, festivals, exhibitions) (Gatti et al., 2003).

Another wine tourism destination that will be analyzed is Australia. Australia is also considered one of the top world tourism destinations. However there is a great discrepancy between the different regions of the country, and most of national organizations are working for diminishing these gaps and actively promote rural tourism (Brown, Getz 2005). Starting with 1990 Australia is positioning its wine tourism industry as a national priority and is constantly developing and promoting its appeal comprising 60 wine regions with more than 500 wineries (Hall et al., 2002).

The promotion of wine tourism is seen by Australian authorities not only as a tool to promote international awareness towards destination, but also as an instrument to promote the less tourism developed rural regions of Australia (Beames, 2003). Very are only few major stakeholders (4 wineries) that control more than 90% of the country's wine production (Brown, Getz, 2005) and promotional activities with national implications are strong related to the activities of the major private stakeholders (Beames, 2003).

Australia is focused on multiple marketing projects for wine tourism promotion as they are concentrated to develop the rural development as well as homogenous tourism distribution among the territory (Beames, 2003). In collaboration with private actors there are organized different festivals and events in the wine regions, annual exhibitions, shows and events which correlate wine tourism with local gastronomy, sightseeing, cultural activities, industrial excursions and in many cases are sponsored by national authorities (Hall et al., 2002). The concept of wine routes is not so well developed as are European alternatives and trails are

more oriented to the trademark of specific regions or wineries rather than to combine different wine regions (Brown, Getz, 2005).

In Australia there is an active role of the local authorities in wine tourism development and promotion with the help of wine tourism strategy which have the role to enhance the regional growth by promoting wine tourism as a strong asset. Both private and public stakeholders are heavily promoting wine tourism products through internet and specialized media in context of the country as a whole wine tourism region (Beames, 2003).

Although the analyzed region differs very much from Moldova by their size, tourism activity, tourism recognition, overall development – it was important to research the wine tourism contribution to the destination tourism attractiveness, marketing and promotional activities and tools used by different well-established wine tourism destination for comparing their measures with Moldavian ones. In the following sections there will be analyzed Moldova's promotional tools to increase wine tourism attractiveness and overall country image among international tourists.

5.2 National Festivals

Wine Vernissaje it is an annual fest organized by the National Office of Wine and Vine with in cooperation with CEED II program, inauguration was in 2007 year, and in 2015 the 8th edition was held. In this fest it is organized a traditional wine fair, where annually more than 30 wine companies from Moldova present their products. The event is remarked by wine and food tastings, different master classes organized by wine companies, professionals and sommeliers, teaching guides in the art of wine and of course traditional songs and hora (national dance). There are invited international guests and foreign wine companies representatives (Wine, 2014; MoldovaHoliday, 2015).

Gustar festival is an ethno-cultural national festival, which is held annually from 2010 In Orheiul Vechi reservation in the last days of August and with duration of 3-5 days.

Figure 23: Gustar Festival



Source. www.Sensmusic.md, 2015

According to the information presented by the organizers, the annual attendance of the festival is around 60000 of visitors, from which around 20% of international visitors. The festival consist from interactive workshops with artisans, crafts fair, traditional cuisine and wine degustation, different events and competitions, sightseeing tours through the reservation, music all the day long and of course Moldavian hospitality (Gustar, 2015).

Wine fair “Targul Vinului” is a biannual festival organized from 2006 year in the location of the biggest national wineries. More than 80 national and international wineries promote their products in the fest. The offer comprise wine and cuisine degustation, culture and history of wine making, wine sales, presentation of new products as well as different contests and events (Wine, 2014).

Sweet Acacia Flower Music Contest (Dulce Floare de Salcam) is an annual festival held in May from 2009, is an ethno cultural festival of traditional music and dances combining folk brands from Moldova and neighborhood countries. It is held in different regions of the country combining music and dances contests with traditional Moldavian wines and cuisine, major wineries have their promotional stands offering tasting, sales and different events (MoldovaHoliday, 2015).

Medieval Festival Is a thematic festival for the first time held in 2014 at Vatra resort. Main activities are related to medieval exhibitions and contests, combining with music and cuisine. The second festival will be held in July 2015 with the reopening of the Soroca fortress. The last year the number of visitor were accounted to 30000.

Figure 24: Medieval Festival



Source. www.flycams.ro

Different activities are made by the major wineries for promotion of their products, this year also were invited wine companies from Romania and Balkans (Vatra, 2015).

Some others more minor festivals are carried in Moldova's regions: Moldova's Village; Christma's Village, Ia-Mania, Picnicul Anului, Etno Balkanic festival (Vatra, 2015). As the hospitality and tradition of Moldova are strong correlated with the wine culture and cuisine, there is no festival or event held in Moldova without the participation of the major actors from wine industry and their products.

5.3 Wine Day

Wine day or National Wine Day is considered the biggest national event related to wines. It is held in Chisinau city in the central plaza in the middle of October. For the first time the event was held in 2002 with the patronage of the president of Moldova.

Figure 25: National Wine Day event



Source. WineofMoldova, 2014

In this festival, almost all the wineries and wine production companies from Moldova are participating with their own stand and agenda. Also are participating wine companies from neighborhood countries for attending different contests with national awards and medals (MoldovaHoliday, 2015). The duration is of 2 days and comprises wine presentations from all the attending companies, wine and cuisine tastings, craftsmen contests and folk music activities, professionals make presentations of wine making processes and wine culture, workshops and cooking shows. All the activities are supplemented by concerts with national and invited artists. (Tur, 2013, respondent D).

The National Wine Day has the mission to combine the best of Moldavian history, culture and wine making traditions. At this event are intensively promoted wine routes from Moldova, offering special discounts to people who reserve tour at this event, the tour can start right away by selecting the desired route or by choosing specific wineries or attractions that are planned for visit. Each region is represented by their wine producing companies and people wearing traditional attires presenting local crafts and handmade products specific to the region (Mindru, 2010).

Figure 26: National wine day event 2



Source. Ziarul National Moldova

International representatives from different countries are invited to attend the event, the representatives of Embassies and high ranked foreign officials, usually attending an official tasting organized by government at one of the major wineries (Wine, 2014).

According to (Timpul, 2014) at the last Wine Day festival held in October 2014, more than 160 thousand of visitors attended the event from which 15 thousand foreign persons. In 2 days, the wineries reported sales of 95 thousand bottles of wine and the revenues received by wine companies from selling bottled and raw wine were reported to near 1 million EUR. There were purchased more than 2000 of trips to the wineries and more than 900 reservation to wine routes were made.

5.4 Wine of Moldova brand

In 2013 Government of Moldova in partnership with CEED II program and National Agency of Wine and Vine have elaborated a national plan for promoting Moldova's image and wine in international market. The program consist of attributing the Wine of Moldova quality brand to the export wines that passes the rigorous control of quality made by specialized organization (CEED, 2014).

The mission of the program is to initiate the promotion of qualitative Moldavian wines on external market by a country brand, according to (TRM, 2014) the government, with the implementation of this program will achieve to primordial objectives: to promote Moldavian wines through the brand of country name Moldova, and to promote Moldova through the exported qualitative wines.

The cost of the program was of around 14 million EUR and will permit to increase the exports of Moldavian wines with 200 million liters by 2020 year. In 2014 only 1/3 of the Moldavian wines have gained the right to utilize the brand Wine of Moldova, resulting that not all the produced wine passed the rigorous quality control, however, the ANVV agency anticipate that till the 2016 year more than a half of wine producers from Moldova will be able to increase their production quality (TRM, 2014).

The brand was officially launched at the ProWein 2014 exhibition in Dusseldorf, Germany and in the first days of activity were signed contract for around 20 million liters with a total value of 35 million EUR. The key markets on which will be oriented the further promotions of the brand are: Romania, Russia, Poland, Czech Republic, China, United States and Canada (Europalibera, 2015, respondent A and B).

5.5 Discover the Roots of Life Moldova and E-resources

As stated by (Tourism 2020, 2014; Certan, 2014) the Moldavian tourism is highly underdeveloped in e-promotion. There is low information and lack of qualitative content regarding the tourism in general and specific attractions from Moldova.

The private companies yet did not realize the potential of internet resources and their effect on promotion (ADTM, 2014), the services and material offered through internet resources are viewed rather secondary than as main business activity. In the new Tourism Development Strategy, Tourism Agency has developed a web portal moldovaholiday.travel with the brand name Discover the Roots of Life Moldova, and the resource was launched in 2014 year (ADTM, 2014, Tourism 2020, 2014).

The resource is funded by public-private partnership with the mission to update the image of the country in World Wide Web area. The resource offers updated information about Moldova, culture, traditions, it has the events schedule and touristic attractions. It offers to its customers the option to book in advance hotels, tours, air tickets and to plan the trip to Moldova. The wine tourism is actively promoted, the logo of the project consisting of a 'tree' design figure with wine glasses at tops, wineries of Moldova are offered as a country business card (MoldovaHoliday, 2014). The routes of life represent the main values and specifics of Moldavian tourism: hospitality, history, wine, cuisine and traditions. Also there is the possibility to book directly from the site trips to Wine Roots and/or to separate wineries. The resource is available in 5 languages (Romanian, Russian, English, French, and German) and is offering the section with an online consultant answering the tourists questions (respondent D).

As mention by developers (MoldovaHoliday, 2014) the resource will be actively promoted in all national and international events and fares with the Moldova's participation, and in the internet will be promoted using advanced SEO techniques and by paid advertising with the biggest search engines.

Also a priority field of activity for Tourism Agency within Tourism Development Strategy 2020 is to help the touristic agency and tour operators to maintain, develop and promote their own web resources. In cooperation with CEED II the Agency will develop and promote 3 thematic wine blogs in internet and will help with consultancies the actual existing resources (Tourism 2020, 2014, respondent D).

Respondent A and B told that they pay increased attention to the development of companies' web sites, web resources and e-commerce. Respondent B has contracts with major online advertisement companies for promoting its products and main resource; also they are using foreign specialized sites (wine forums, touristic portals, and specialized journals) to promote their products and wine tourism, respondent A told that about 20% of international visitor to his company are arriving thanks to this actions. Respondent C agreed with the importance of web resources for tourism promotion, but his company "is making much too low that it should" to explore this opportunities (as he mention mainly because of the lack of approval from board of directors).

5.6 Moldavian country logo and promotional TV spot

In the framework of rebranding Moldova as a tourist destination, Tourism Agency decided to apply new tools of promoting country's image. With the launch of the Moldova Holiday project a new country tourist logo was developed (Figure 27)

Figure 27: Moldova's touristic logo



Source. MoldovaHoliday, 2014

As stated by the Tourism Agency (ATRM, 2015) tourism sector is increasingly becoming an important sector of national economy, and the rebranding of the country's image will help to increase international awareness towards our products. By choosing the new logo meaning the focus was put on the specific features that tourist will experience above expectations: hospitality, culture, traditions and wine. The new logo will be printed on all touristic promotional material and official websites, also the tourism agencies and operators were suggested to include the logo in their own promotional material, so the country will be promoted as a unique brand (ATRM, 2015; MoldovaHoliday, 2015).

The Tourism Agency has elaborated an advertisement clip to promote tourism in Moldova through a unique brand. With a total of 3 different versions made (20 seconds for web placing, 40 seconds for TV advertising and 6 minutes for web placing). The clip was presented at the end of 2014 year and is proposed to be run on TV starting with 2015 year (Diez, 2014). The clip tries to reveal the beautiful places and attraction from Moldova to present interest to the potential customers: the clip contains images from Cricova, Milestii-Mici wineries, vineyards and underground wine cellars (presenting cellars as a unique feature

of Moldavian tourism) (WineofMolova, 2015), images from Gustar and Wine Day festivals, Frumoasa, Curchi, Capriana monasteries, Orheiul Vechi reservation and Soroca fortress. Also it is related the traditional Moldovian hospitality and cuisine, inviting the visitors to taste Mamaliga with a cup of red wine, a must do gastronomic attraction for everyone visiting Moldova (MoldovaHoliday, 2015, respondent D)

The promotion on internal market started in November 2014, and for the 2015 year is planned to sign contracts with popular international TV channels: CNN, BBC, Euronews, Travel Channel and National Geographic (Publika, 2014). Also for the 2015 Tourism Agency plan to develop a project in cooperation with USAID, Travel Channel and National Geographic to make 2 series of cultural shows describing the Moldovian wine culture and traditions which are planned to be shot at Cricova and Milestii-Mici wineries (ATRM, 2015, respondent D).

5.7 National and International fares and exhibitions

Moldavian wineries have a long tradition of participating in national and international specialized competitions, fests and exhibitions and their products are among nominated and awarded (Cricova, 2015; Purcari, 2015). Such participation not only promotes their products, but increase Moldova's popularity among interested wine tourism visitors and clients of such exhibitions and contests (respondent C).

Following are presented some nominations and awards of the Moldavian wines in international fares: Gold Medal for Purcari wines at International Wine Contest, Belgium , 2003; Gold Medal for Cricova Chardonnay wines at International contest "Chardonnay du Monde" France, 2003; Gold and Silver medals for Cricova wines at Prodexpo exhibition in Russia, 2002, 2003, 2009, 2012, 2014; Gold and bronze medal for Milestii-Mici wines at International wine and strong drinks contest, Romania, 2000; 2006 etc. (Cricova, 2015; Purcari, 2015, respondents A, B, C).

Also a record number of Moldavian companies have presented their production at the International contest of alcoholic beverages ProWein 2015 in Germany and till the end of

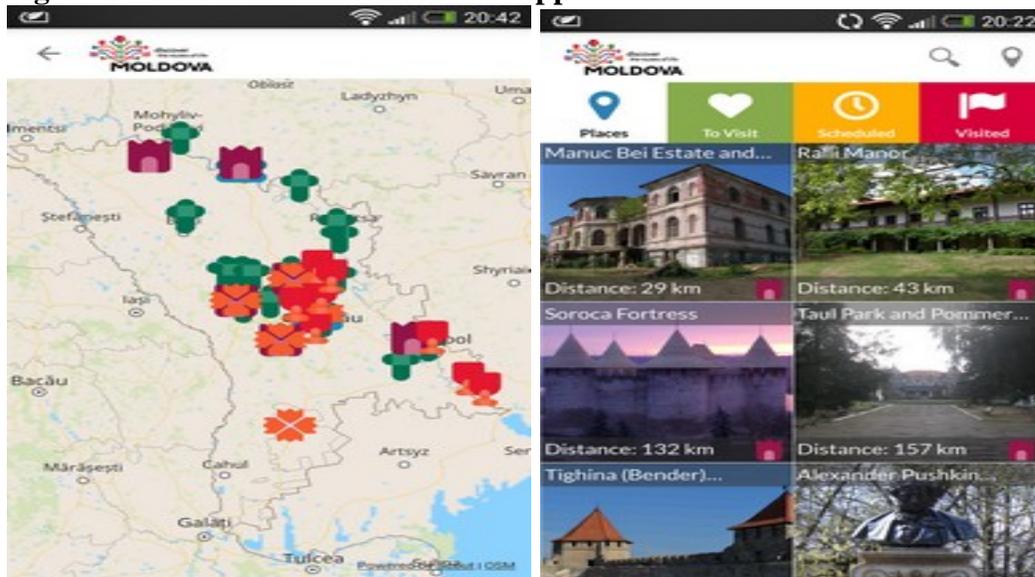
2015 year, National office of Wine and Vine propose to promote Moldova at 10 more international exhibitions (Diez, 2015).

It is to mention that 2 times per year, in Moldova is held ExpoVin exhibition from 1992 year. At this exhibition national and international wineries and wine related companies can promote and exhibit their products. Among the exhibitors there are companies making machinery, secondary and tertiary products for wine production, tourism agencies and consultancy service suppliers. In 2014 year there were 149 participants from which 89 national and 60 international companies form 12 countries, the number of visitors were accounted to more than 10 thousands (VinMoldova, 2014).

5.8 Mobile application

As stated by (ADTM, 2014; Certan, 2014) Moldova is almost not covered by mobile touristic application, due to the fact that it is a relatively small demand for such products in comparison with other destination. Private companies are not interested in developing applications with unknown reliability.

Figure 28: Moldova’s tourism mobile application interface



Source. MoldovaHoliday, 2015

The mobile applications market consist of huge and diverse offer, however tourism related application are among the top 10 most frequently downloaded, 60% of the 1,8 billion smartphones and tablets users have downloaded and used such application, and more than 45% of users plan future vacations with the help of such applications (Airport, 2015).

According to (ATRM, 2014), only 15% of international tourist visiting Moldova are using the service of the tour agencies or operators, the rest of them are planning and making their trip by their own, in this context the development of a free mobile application for the present and future tourist was crucial. In April 2015 the first mobile application with Moldavian touristic destination (Figure 28) was launched (Moldpres, 2015).

This application was developed by Tourism Agency within the Moldova's rebranding project Moldova Holiday (MoldovaHoliday, 2015), and will serve as autonomous guide for tourist visiting Moldova by their own as well as an additional instrument for tourist using the services of tourism agencies (Molpres, 2015).

The application offers the features of general information regarding the most popular tourist attraction from Moldova (wineries, churches, monuments, museums, events) plan routes, download maps and using them in offline mode through GPS navigation, interactive updating schedule and prices offered by different tourism stakeholders (respondent D; application interface). In cooperation with major wineries in the future update is planned to introduce the possibility to book tours through application with discounts and special offers (ATRM, 2015).

Through the promotion campaign in the April month, 2015, 10000 promotional SIM cards with access to free 3G network and QR code of the applications was distributed to the arriving tourists in the Chisinau airport (MoldovaHoliday, 2015). In Android market the application has more than 5 thousand downloads and in IOS market around 4000 as of May 2015.

Respondents A and B have very positive attitude towards the applications as stated by interviewee B "it is something special, ours, made in Moldova for Moldova" and a cooperating with the developers and Tourism Agency to increase the potential and the range of services offered through the application. Both companies are preparing special offers for

tourist to be included in the next application update. Respondent C also is cooperating with the application developers (as it is state funded and promoted by the Tourism Agency it had major coverage for our company) and considers it a great tool for promoting Moldova, as they already received a lot of inquiries regarding tours, services and overall tourism in Moldova from foreign users.

Conclusions and recommendations

The paper analyzed the Wine Tourism as an opportunity to increase international awareness towards Moldova as a tourism destination. In the course of paper the wine tourism was identified as a niche market of general tourism encircled around wine and wineries, developed from the agro-rural tourism and usually associated and in close relation with cultural and gastronomic experience sought by the tourist at destinations. Destination attractiveness is achieved by combining the existing resources with infrastructure, services and promotion. International awareness can be increased by promoting efficient marketing strategies and evolving the strong parts and main attractions of the destination.

The tourism sector in Moldova is a relatively new phenomenon and is still facing all the problems related to economic and social conjuncture of a transition economy. It was severely affected by the lack of attention and involvement from the government and specialized institutions which persists for more than a decade. The problems and advantages of the tourism sector were identified and analyzed in this study. During primary and secondary research, wine tourism was found one of the biggest contributors to the tourism in Moldova, however, as the state and specialized institutions recognize its importance it is still treated in the expanded rural tourism.

As there are a lot of barriers for tourism activity in Moldova (poor infrastructure, imperfect legislation, lack of qualified suppliers, poor organizations, few developed attractions) it does not consist the main problem of the little tourist arrivals, as the experience gained by tourists is mostly positive. The biggest problem was identified the lack of promotion and as result a low awareness of the destination among foreign tourist.

As stated before, wine tourism was discovered as one of the biggest contributors to the tourism in Moldova, and its promotion can greatly increase the potential touristic outcome, as result it presents an opportunity for Moldova to increase its international awareness as tourism destination.

In the last years the importance of marketing and promotion was increasingly accepted and acknowledged by the tourism and wine tourism stakeholders and as a result there were implemented several public projects and strategies to focus on tourism promotion (festivals,

development plans, commercial spot, national and international exhibitions and fares, programs developed and maintained by Tourism Agency: Moldova Holiday, Wine of Moldova etc). Private stakeholders also started to pay more attention and are increasingly funding the promotion of their products and wine tourism on foreign markets.

The analysis of the case studies and the information provided in the interviews showed that the available resources are not valorized at their real potential. There is a big gap between marketing and development approaches between companies owned by private and public sectors. Although all of them agreed with the importance of promotion and capitalizations of the available resources, they are still limited in funding, progressive management and the tourism component of the business is still evaluated as a side effect of the activity.

The negative experience of the previous actions and development strategies conducted by the government led to the elaboration of new policies and a total rebranding of the promotional policies and activities headed at national and international levels. As many of them are very recent (2013-2015) years and others are still in the development and implementation stages, the direct and indirect impact of them is very premature to be evaluated, as the real effects will be seen in several years. As this paper contributes to the literature about tourism, wine tourism in Moldova, yet, it represents only the first attempt to investigate the topic of the wine tourism impact on the overall Moldova's attractiveness and further research is needed to evaluate more in-depth insights. The evaluation of the impact of the newly adopted marketing strategies and to conduct a research of wine tourism tourist profile and their behavior and experience are just few of the proposed objectives for further research.

Although the Moldova's tourism market differs a lot from the world leading wine tourism destinations (Australia, France, Italy), it can be seen that the marketing strategies and approaches as well as the used tools are usually the same. This means that with the right approach and implementation they can provide good results, and accounting specific barriers encountered by Moldova I will provide further some recommendations for policy makers.

As (Getz, 2000) stated that there is a multitude of factors and barriers influencing the success of the wine tourism and destination's appeal to increase their market share, several policy

recommendation were made for Moldavian tourism, wine tourism and their promotion actions:

Implementation of TSA system: will permit to provide and analyze much more accurate data regarding tourism arrivals and activity, will dismiss the interpretations of different statistical information by different institution, will improve the development and application procedure of the national strategies as they rely on poor available statistical data.

Evaluation and actualization of the tourism strategy plans: once in 2-3 year (right now it is done once in 6-10 years), will provide much more accurate data regarding the results and objectives, will improve overall quality of the strategies as tourism sector is fast-evolving

Better cooperation between Tourism Agency and wine tourism direct suppliers: most of the wine tourism direct suppliers are not aware of the full benefits of development and promotion of the tourism side of activity, resource are not used and developed at their potential, management staff is not aware and competent in marketing strategies.

More aggressive and determinant wine tourism marketing into international markets: marketing and promotional campaigns are still recent and do not have wide coverage, not all wine tourism stakeholders have own or cooperate in marketing campaigns, poor cooperation between stakeholders and state institutions, better cooperation will result in more focused and target oriented campaigns.

To increase the qualifications and education of the wine tourism related staff: a poor experience gained by visitor will have negative effects of Moldova image; the current staff usually do not have special training and qualification, is not familiar with foreign languages, better staff – better and more provided services.

Renovation and development of infrastructure, sign-posting and guides: actual situation is in very deplorable conditions, poor access points, old guides and no post-signage improvement of these factors will increase the overall experience of tourists, will facilitate they movement and attractions appeal, will make possible to cover more attractions and places in less time with better logistics.

Better control of the tourism agencies and tour operators: will increase the overall experience, will dismiss the poor quality and overpriced services, and will increase the feedback of the provided services, classification and legalization of all accommodation and catering operators.

Better cooperation between Tourism Agency, private initiatives and tourism portals: there are good private initiatives (blogs, forums, web sites) but they lack knowledge and funds for active promotions, Moldova is almost inexistent on popular touristic internet domains, will increase the overall awareness and appeal of the destination.

Better development and coverage of e-commerce and services: Moldova lack e-commerce possibilities and range of provided services from both public and private actors, will increase overall logistics, awareness, appeal of the destination.

Bibliography

- Airport (2015): Revista specializata de noutati al Aeroporului din Chisinau, Prima aplicatie mobila cu brandul turistic Moldova Holiday a fost lansata, <http://www.airport.md/news-en/5870/> (10.04.2015)
- ADTM (2011): Analiza diagnostic a sectorului turistic din Republica Moldova pentru anii 2003-2010, Asociatia de Dezvoltare a Turismului in Moldova, Chisinau
- ADTM (2012): Amplasarea teritoriala a zonelor turistice in Republica Moldova, Asociatia de Dezvoltare a Turismului in Moldova, Chisinau, 2012 <http://adtm.md/wp-content/uploads/2013/04/Zone-turistice-general-RM.pdf> (14.12.2014)
- ADTM (2013): Propuneri pentru imbunatatirea Strategiei de Dezvoltare a Turismului in perioada 2013-2020, Asociatia de Dezvoltare a Turismului in Moldova, Chisinau, <http://adtm.md/wp-content/uploads/2013/08/Propuneri-ADTM-pentru-Strategia-TURISM-2020.pdf> (12.12.2014)
- ADTM (2014): Alternativa la Strategia de Dezvoltare a Turismului in Perioada 2013-2020, Asociatia pentru Dezvoltarea Turismului in Moldova, Chisinau, 2014
- ATRM (2010a): Agentia Turismului Republicii Moldova Ghid Turistic Drumul Vinului, Chisinau, 2010 http://www.turism.gov.md/files/6340_GUIDE2_viewpdf2.pdf (04.10.2014)
- ATRM (2010b): Agentia Turismului Republicii Moldova, revista Moldova Turistica, Chisinau, 2010, http://www.turism.gov.md/files/2824_GUIDE1_viewpdf2.pdf (04.10.2014)
- ATRM (2010c): Agentia Turismului Republicii Moldova, Ghid Turistic Drumul Manastirilor, Chisinau, 2010, http://www.turism.gov.md/files/8249_GUIDE3_viewpdf2.pdf (04.10.2014)
- ATRM (2013): Agentia Turismului Republicii Moldova, Revista Turism VitiVinicol, Chisinau, 2013, http://www.turism.gov.md/index.php?pag=proiecte_finalizate&opa=view&id=9&start=&l= (04.10.2014)

- ATRM (2015): Agentia Turismului Republicii Moldova, resursa web oficiala http://www.turism.gov.md/index.php?pag=proiecte_finalizate&l= (04.10.2014)
- Asero, V. / Patti, S. (2009): From wine production to wine tourism experience: the case of Italy, http://www.wine-economics.org/workingpapers/AAWE_WP52.pdf (01.10.2014)
- Beames, G. (2003): The rock, the reef and the grape: the challenges of developing wine tourism in regional Australia, *Journal of Vacation Marketing*, volume 9, issue 3, pp 205-212
- Beritelli, P. / Laesser, C. (2011): Power dimensions and influence reputation in tourist destinations: Emprirical evidence from a network of actors and stakeholders. *Tourism Management*, volume 32, 1299-1309
- Bieger, T. / Beritelli, P. (2013): *Management von Destinationen*, 8th Edition, München: Oldenbourg Wissenschaftsverlag GmbH.
- BNM (2015): National Bank of Moldova, Inflation forecast and the evolution of exchange rates in Moldova http://bnm.md/md/inflation_forecast (20.04.2015)
- Boodhoo, R. / Purmessur, R. D. (2009): Justification for Qualitative Research in Organizations: a Step Forward, *The Journal of Online Education*, New York, <http://www.nyu.edu/classes/keefer/waoe/deeprosh2.pdf> (06.10.2014)
- Brown, G. / Getz, D. (2005): Linking wine preferences to the choice of wine tourism destinations, *Journal of Travel Research*, volume 43, issue 3, pp 266-276
- Bruwer, J. (2003): South African wine routes: some perspectives on the wine tourism industry's structural dimensions and wine tourism product, *Tourism Management*, Volume 24, issue 1, 423-435
- Buhalis, D. (2000): Marketing the competitive destination of the future. *Tourism Management*, Volume 21, issue 1, 97-116.
- Cazes, G. / Potier, F. (1998): *Le Tourisme et la Ville: Expériences Européennes*. Harmattan: Editions L'Harmattan

- CEED (2014): Competitiveness Enhancement and Enterprise Development II Program for Republic of Moldova, official web-site, <http://ceed.md/en/publications> (10.10.2014)
- Certan, S. / Certan, I. (2014): Potentialul Turismului Rural al Republicii Moldova, Revista teoretico-stiintifica: Economie si Sociologie, IEFS, nr.4 pp 32-42
- Charters, S. / Ali-Knight, J. (2002): Who is the wine tourist?, Tourism Management, Volume 23 issue 3, 311-319
- Chetrari, V. (2003): Drumul Vinului in Moldova, Journal of Economic Overview of Moldova, issue 6, pp 502, Logos Press, Chisinau, <http://logos.press.md/node/12092> (04.03.2015)
- Colesnicova, T. / Iatisin, T. (2014): Analiza dezvoltarii turismului viti-vinivol in lume, Revista teoretico-stiintifica Economie si Sociologie, volumul 2, 2014, pp 78-84
- Cooper, C. / Fletcher, J. / Gilbert, D. / Wanhill, S. (2008): Tourism: Principles and Practice, 4th Edition, Harlow: Pearson Education Limited.
- Corigliano, M.A. (1996): Enoturismo: Caratteristiche della domanda strategie di offerta e aspetti territoriali e ambientali, Franco Angeli, Milano
- Costa, A. J. (2012): Food and wine tourism: Challenges and Opportunities, in UNWTO: Global Report on Food Tourism, 2012.
- Cricova (2014). Combinatul de productie vitivinicola Cricova, web resurs official al companiei, <http://cricova.md/istoria.php#1>, (12.12.2014)
- Crouch, G., I. (2007): Modelling destination competitiveness: a survey and analysis of the impact of competitive attributes, http://www.sustainabletourisonline.com/awms/Upload/Resource/bookshop/Crouch_modeIDestnComp-web.pdf (10.02.2015)
- Diez (2014): Portalul media de stiri din Moldova Diez, Veriunea complete a filmului publicitar – turistic “Moldova-Holiday”, <http://diez.md/2014/02/13/video-versiunea-completa-a-filmului-publicitar-turistic-moldova-holiday/> (10.10.2014)

- Douglas, N. / Derret, R. (2001): *Special Interest Tourism*, Wiley, London
- Dwyer, L. / Kim, C. (2003): *Destination Competitiveness: determinants and indicators*, *Current Issues in Tourism*, Volume 6, issue 5, 2003, 369-414
- Dwyer, L. / Forsyth, P. (2006): *International Handbook on the Economics of Tourism*, Cheltenham, Northampton: Edward Elgar Publishing.
- Enrich, M., J. / Newton, J. (2005): *Determinants of tourism destination competitiveness in Asia Pacific: comprehensiveness and universality*, <http://www.estig.ipbeja.pt/~aibpr/Ensino/EngDesenvTur/MaterialdeApoio/2semestre/CroucheRitchie/AsiaStudyCase.pdf> (09.12.2014)
- Europalibera (2015): *Radio Europa Libera, Vasile Bumacov, Brandul national, Vin Moldova va pune in aplicare restrictiile la vinurile de calitate joasa*, <http://www.europalibera.org/content/article/25120213.html> (14.03.2015)
- Florea, S. (2005): *Potentialul turistic al Republicii Moldova*, Labirint, Chisinau
- Freyer, W. (2011): *Tourismus-Marketing: Marktorientiertes Management im Mikro-und Makrobereich der Tourismuswirtschaft*, 7th Edition, München: Oldenbourg Wissenschaftsverlag GmbH.
- Gatti, S. / Girand, E. / Mili, S. (2003): *Wine in the old world. New risk and opportunities*, Milano, Italy
- Getz D. (2000): *Explore Wine Tourism: Management, Development and Destination*, Cognizant, New York
- Getz D. / Brown G. (2006): *Critical success factors for wine tourism regions: a demand analysis*, *Tourism Management*, volume 27, issue 1, 146-158
- Greener, S. (2008): *Business Research Methods*, Sue Greener & Ventus Publishing ApS, <http://dl.is.vnu.edu.vn/bitstream/123456789/269/1/introduction-to-research-methods.pdf> (09.09.2014)

- Guinness (2014): Guinness World Records, The Largest wine cellar by number of bottles, <http://www.guinnessworldrecords.com/world-records/largest-wine-cellar-by-number-of-bottles/> (24.04.2015)
- Gustar (2015): Gustar festivalul annual de etno-cultura, web resurs official al evenimentului, <http://gustar.md/ro/pages/about/> (20.04.2015)
- Hall, C.M. (1996): Wine Tourism in New Zealand. Towards a more sustainable tourism conference proceedings, Centre for Tourism, University of Otago
- Hall, C.M. / Sharples, L. / Cambourne, B. / Macionis, N. (2002): Wine Tourism Around The World: Development, management and markets, Oxford: Butterworth-Heinemann
- Hall, C. M. / Mitchell, R. (2006): Wine tourism research: The state of Play, Tourism Review International, col 9, 307-322
- Hassan, S. (2000): Determinants of market competitiveness in an environmentally sustainable tourism industry, Journal of Travel Research 38 (3); 239-245.
- Hudelson, J.E. (2014): Eastern Promises: The potential future for wine tourism in the Balkans, American Journal of Tourism Management, 34-50
- Ivanovic, M. (2008): Cultural Tourism. Cape Town: Juta and Company Ltd.
- Jago, L.K. / Issaverdis, J.P. / Graham, D. (2000): The wine tourist: what's in a name?, CAUTHE National Research Conference, Australia
- Jolondcovschi, A. / Florea, S. (2001): Turismul ecologic si rural: realitati si perspective, Prometeu, Chisinau
- Kaspar, C. (1991): 50 Jahre touristische und verkehrswirtschaftliche Lehre und Forschung an der Hochschule St. Gallen, Institut für Tourismus und Verkeswirtschaft an der Hochschule St. Gallen.
- Kozak, M / Baloglu, S. (2011): Managing and Marketing Tourist Destinations, Strategies to Gain a competitive edge/ Abington: Taylor and Francis
- Law, C. (2002): Urban tourism: the visitor economy and the growth of large cities. London, New York: Cengage Learning EMEA.

- Lonelyplanet (2013): Moldova: embracing its status as Europe's least-visited country by Pettersen, L., <http://www.lonelyplanet.com/europe/travel-tips-and-articles/77774?intaffil=lpemail> (15.02.2015)
- Marzi-Navarro, M. / Pedraja-Iglesias, M. (2010): Are there different profiles of wine tourists? A initial approach. International Journal of Wine Business Research, Volume 22, issue 4, 349-361
- Mazilu, M. (2012): Sustainable tourism of destination, imperative triangle among: competitiveness, effective management and proper financing, http://cdn.intechopen.com/pdfs/29224/InTech-Sustainable_tourism_of_destination_imperative_triangle_among_competitiveness_effective_management_and_proper_financing.pdf (11.10.2014)
- Merret, D. / Whitwell, G. (1994): The Empire strikes back: Marketing Australian beer and wine in the United Kingdom, Brands and marketing in food and drink, London, Routledge
- Milestii Mici (2014): Compania de productie vitvinicola din Republica Moldova Milestii Mici, web resurs official al companiei, <http://www.milestii-mici.md/ro/> (12.12.2014)
- Mill, R. C. / Morrison, A. M. (2012): The Tourism System 7th edition. Dubuque, Iowa: Kendall/Hunt
- Minciu, R. (2000): Economia Turismului, Bucuresti, Editura Uranus
- Mindru, I. (2010): Turismul Viti-Vinicol in Republica Moldova, Cercetari oentru teza de doctor in domeniul Marketing si REI, Insitulul International de Management Imi-NOVA, Chisinau, 2010
- Miron, V. / Gututui, V. (2005): Turismul in ariile naturale din Republica Moldova, Continental Grup, Chisinau
- Miron, V. (2006): Managementul resurselor turistice in mediul rural din Republica Moldova (autoreferat de doctor in economie), Chisinau

- Miron, V. (2013): Alternativa la Strategia de dezvoltare a turismului in perioada 2013-2020, Grupul de lucru economie, finante si mediu antreprenorial, Asociatia de dezvoltare a turismului in Moldova, <http://www.cnp.md/ro/produse/avize-propuneri/1608/Alternativa-la-Strategia-de-Dezvoltare-Turismului.pdf> (09.01.2015)
- Mitchell, R. / Hall, C.M. / McIntosh, A. (2000): Wine Tourism and consumer behaviour, Wine tourism around the world. Oxford: Butterworth Heinemann
- Mitchell, R. (2006): Influences on post-visit wine purchase by New Zealand winery visitors. Global Wine Tourism: Research Management and Marketing, London, 95-109
- Mohhamadi, M. / Rast, S. / Khalifah, Z. (2010): The concept of competitiveness in the area of tourism destinations, http://www.academia.edu/1471793/The_Concept_of_Competitiveness_in_the_Area_of_Tourism_Destinations (10.11.2014)
- MoldovaHoliday (2015): Discover the routes of life Moldova, web resurs official al proiectului, <http://www.moldovaholiday.travel/index.php?lang=en> (12.01.2015)
- Moldpres (2015): Agentia de noutati de stat din Moldova Moldpres, A fost lansata prima aplicatie mobila cu destinatiile turistice ale Republicii Moldova, <http://www.moldpres.md/news/2015/04/06/15002271> (10.04.2015)
- Morrison, A. M. (2012): Marketing and Managing Tourism Destinations. London: Routledge
- Morrison, A. M. (2014): Destination management and destination marketing: The platform for excellence in tourism destinations, http://www.researchgate.net/publication/257603625_Destination_management_and_destination_marketing_The_platform_for_excellence_in_tourism_destinations (12.10.2014).
- Nebunu, A. (2012): Assessment of national tourism development strategy: Republic of Moldova, http://www.ceeweb.org/wp-content/uploads/2013/02/Final_NTDS-Assessment_Moldova.pdf (17.03.2015)
- NIER (2014): National Institute for Economic Research of Moldova, Moldovan Economic Trends, volume 16 (Q4) 2014, Chisinau

- NSB – National statistics bureau (2014): Raportul preliminar al biroului de statistica a Moldovei, editia 2014, analiza situatiei pe tara si indicatori macroeconomici, trimestrul 1.
- NSB – National statistics bureau (2014b): Numarul turistilor straini cazati in structurile de primire turistica colective cu functie de cazare, pe principalele tari de origine, <http://www.statistica.md/category.php?l=ro&idc=293&> (11.04.2015)
- O'Neill, M. / Palmer, A. (2004), Wine production and tourism: Adding service to a perfect partnership, Cornell Hospitality Quarterly
- OIV International Organization of Vine and Wine (2014): The wine market: developments and trends, http://www.oiv.int/oiv/info/en_press_conference_may_2014_06.02.15.
- Olaru, O. (2012): Wine Tourism – An opportunity for the development of wine industry, The Bucharest University of Economic Studies, http://fse.tibiscus.ro/anale/Lucrari2012_2/AnaleFSE_2012_2_024.pdf (12.09.2014)
- Page, S. (1995): Urban Tourism. London: Routledge.
- Palmer, A. / O'Neill, M. (2004): Wine production and tourism: Adding service to a perfect partnership. Cornell Hotel and Restaurant Administrative Quarterly, volume 45, issue 3, pp 269-284
- Poon, A. (1993): Tourism, technology and competitive strategies, Volume 2, Oxfordshire, New York: CAB International Publishing.
- Popp, L. (2013): Understanding the push and pull motivations and itinerary patterns of wine tourism. Master thesis, Michigan State University
- Prezenza, A. / Minguzzi, A. / Petrillo, C. (2010): Managing wine tourism in Italy, Journal of Tourism Consumption and Practice, volume 2, issue 1, pp 46-61
- Publika (2014): Lansat si deja controversat. Agentia Turismului a prezentat noul spot pentru promovarea imaginii turistice a Republicii Moldova, http://www.publika.md/lansat-si-deja-controversat-agentia-turismului-a-prezentat-noul-spot-pentru-promovarea-imaginii-turistice-a-republicii-moldova-video_1798151.html (10.10.2014)

- Publika (2015): Moldova are cu ce sa se mandri, cum arata cetatea Sorociei dupa renovare, http://www.publika.md/moldova-are-cu-ce-se-mandri--cum-arata-cetatea-sorociei-dupa-renovare_2308341.html (18.05.2015)
- Purcari (2014): Compania de productie vitivinicola din Republica Moldova Purcari, web resurs oficial al companiei, <http://www.purcari.md/newsite/?lang=ro> (12.12.2014)
- Raut, A. / Bhakay, J. (2012): Wine tourism in Maharashtra: problems and solutions, <http://www.ajofai.info/Abstract/Wine%20tourism%20in%20maharashtra%20-%20problems%20and%20solutions.pdf> (10.10.2014)
- Richards, G. (1996): Cultural tourism in Europe. Oxfordshire, New York: CAB International Publishing.
- Ritchie, B. / Crouch, G. (2003): The Competitive Destination: A Sustainable Tourism Perspective, Wallingford: CABI Publishing.
- Romano, M. / Natili, M. (2009): Wine tourism in Italy: New styles and profiles of consumption, An International Interdisciplinary Journal of Tourism, volume 57, issue 4, pp 463-376
- Rosca, D. (2008): Strategii de marketing in dezvoltarea si promovarea ecoturismului in Republica Moldova, teza de doctor in economie, Academia de Studii Economice a Moldovei, Chisinau
- Sabo-Bucur, M. (2006): Marketing Touristic, Irceson, Bucuresti
- Selby, M. (2004): Understanding urban tourism: image, culture and experience. New York: I. B. Tauris.
- Sharpley, R. / Sharpley, J. (1997): Rural Tourism: an introduction, International Thomson Business Press, Oxford.
- Statistica (2004b): Recensamnatul populatiei 2004, Populatie dupa nationalitatile de baza, in profil territorial <http://www.statistica.md/pageview.php?l=ro&idc=295&id=2234> (10.02.2015)

- Statistica (2004c): Recensământul populației 2004, Populația după naționalitățile de bază, limba maternă și limba în care vorbește de obicei, <http://www.statistica.md/pageview.php?l=ro&idc=295&id=2234> (10.02.2015)
- Statistica (2014): Statistical Yearbook of the Republic of Moldova, 2014 edition, <http://www.statistica.md/newsview.php?l=en&idc=30&id=4727&parent=0> (18.10.2014).
- Statistica (2014b): Nota informativă privind rezultatele preliminare ale recensământului populației și locuințelor din Republica Moldova în anul 2014, http://www.statistica.md/public/files/Recensamint/Recensamint_pop_2014/Nota_informativa_Preliminare_Recensamint_2014.pdf (10.02.2015)
- Statistica (2014c): Recensământul populației pe sexe și medii, în profil teritorial, pe anii 1959, 1970, 1979, 1989 și 2004, <http://www.statistica.md/pageview.php?l=ro&idc=295&id=2234> (10.02.2015)
- Statistica (2014d): Number of arrivals of foreign visitors in the republic of Moldova, through travel agencies and tour operators, by countries of origin <http://www.statistica.md/category.php?l=ro&idc=293&> (10.02.2015)
- Stirop, V. (2013): Organizarea ca funcție specifică a managementului sistemului activității întreprinderilor vitivinicole din Republica Moldova, revista teoretico-stiințifică Economie și Sociologie, volumul 1, 2013, pp 119-123
- Timpul (2014): Ziarul municipal timpul, Ziua națională a vinului 2014 – record impresionant pentru Moldova, <http://www.timpul.md/articol/ziua-nationala-a-vinului-2014---record-impresionant-pentru-moldova-64428.html> (18.11.2014)
- Tourism 2020 (2014): Strategia de dezvoltare a Turismului în Republica Moldova 2020, Planul de acțiuni pentru implementarea acesteia în anii 2014-2016, Guvernul Republicii Moldova, Chișinău, 2014, <http://www.turism.gov.md/index.php?pag=sec&id=39&l=> (14.12.2014)
- Tourism Western Australia (2006): Ecotourism vs Based Tourism, QuickStart Guide to a Tourism Business, <http://www.tourism.wa.gov.au/Publications%20Library/Growing%20>

Your%20Business/Ecotourism%20vs%20Nature%20Based%20Tourism%20v3%20260706%20%28final%29.pdf (09.11.2014).

Tourism New South Wales (2014): Defining “Nature Tourism”: meaning, value and boundaries, Understanding nature-based tourism, No. 2, http://archive.tourism.nsw.gov.au/Sites/SiteID6/objLib13/2_defining_nature_tourism.pdf (07.11.2014).

Travel & Tourism (2014): Travel and Tourism: Economic Impact on Moldova 2014 edition, World Travel & Tourism Council, <http://www.wttc.org/-/media/files/reports/economic%20impact%20research/country%20reports/moldova2014.pdf> (18.02.2015).

TRM (2013): Insitutia Publica Nationala a Audiovizualului Teleradio Moldova, Brandul National “Vin de Moldova” a fost lansat oficial, <http://www.trm.md/en/economic/brandul-national-wine-of-moldova-a-fost-lansat-oficial> (10.02.2014)

Tur, (2013): Turismul vitivinicol, durmul vinului in Moldova, preznetul sectorului viti-vinicol, UNDP Moldova, Sustainable Tourism Development Project, <http://www.tur.md/rom/section/216/> (26.10.2014)

Turcov, E. (2001): Unele aspect ale dezvoltarii turismului in Republica Moldova, Economie si Finante, Chisinau

Turcov, E. (2006): Coordonarea turismului, Academia de Studii Economice din Moldova, Chisinau

TV7 (2015): Canalul privat de noutati si divertisment din Republica Moldova TV 7, Moldova ar outea fi introdusa in circuitul turistic european “Drumul Vinului”, <http://www.tv7.md/ro/economic/moldova-va-fi-introdusa-in-circuitul-turistic-european-drumul-vinului/> (10.04.2015)

United Nations (2002): United Nations Republic of Moldova Country profile, Johannesburg summit 2002, <http://www.un.org/esa/agenda21/natinfo/wssd/moldova.pdf> (08.02.2015).

- UNWTO (2007): A practical guide to Tourism Destination Management, https://pub.unwto.org/WebRoot/Store/Shops/Infoshop/4745/8BCE/AD9A/ECA8/048B/C0A8/0164/0B7A/071115_practical_guide_destination_management_excerpt.pdf (21.01.2015).
- UNWTO (2012): UNWTO Global Report on Food Tourism http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/food_tourism_report.pdf (14.10.2014)
- UNWTOa (2014): Tourism Highlights, 2014 edition http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_highlights14_en.pdf (20.10.2014).
- UNWTOb (2014): UNWTO Annual report 2013 http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_annual_report_2013_0.pdf (21.10.2014)
- Vatra (2015): Complexul turistic de odihna Vatra, evenimente si manifestari, web resurs oficial al companiei, <http://vatrafest.com/evenimente-2014/> (15.05.2015)
- Veal, A. J. (2006): Research Methods for Leisure and Tourism, Harlow: Pearson Education
- VinMoldova (2014): Resurs specializat in analiza pietei vinului si viticulturii din Republica Moldova, web resurs oficial al companiei, <http://vinmoldova.md/index.php?mod=content&id=193> (01.02.2015)
- Waller, D. (2006): Wine tourism: the case of Alsace. Master thesis in European Tourism Management, Bournemouth University, United Kingdom
- Wine (2014): Resurs specializat in promovarea si distributia vinului, Istoria Vinificatiei in Moldova, <http://wine.md/content/istoria-vinificatiei-in-moldova/> (04.10.2014)
- WineofMoldova (2014): Official website of government program for promoting Moldovian wines as a unique brand Wine Of Moldova, 2014, <http://wineofmoldova.com/> (10.02.2015)

Wine Tourism Strategy, Western Australia (2000): Tourism Commission and Wine Industry Association of Western Australia

WiseGEEK (2014): What is rural tourism?, <http://www.wisegeek.com/what-is-rural-tourism.htm> (30.11.2014).

Wei-Chiang Hong, S. (2008): Competitiveness in the Tourism Sector: A Comprehensive Approach from Economic and Management Points, Heidelberg: Physica-Verlag, Springer.

WEF World Economic Forum (2015): The Travel & Tourism Competitiveness Report, growth through shocks, 2015 edition, World Economic Forum, http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf (02.04.2015).

Wober, K. (1997): An urban tourism database. In Mazanec, J. / Grabler, K. / Maier, G. / Wober, K.: International City Tourism: Analysis and Strategy. London: Continuum International Publishing.

World Tourism Organization (UNWTO) (1993): Yearbook of Tourism Statistics, Volume 2, 45th Edition.

Wray, M. / Dredge, D. / Cox, C. / Bultjens, J. / Hollick, M. / Lee, D. / Pearlman, M. / Lacroix, C. (2010): Sustainable regional tourism destinations. Best practice for management, development and marketing, CRS for Sustainable tourism, Queensland.

Appendix 1. Questions used in the semi-structured interviews

All the respondents were asked to participate on voluntary basis and were notified that the interview will be recorded for facilitating the data analysis, and the information provided by them is strictly confidential and will not be shared with third parties or used in commercial purposes.

Question in interviews with the wineries:

1. Is tourism and wine tourism perceived as part of the business of your company?
2. Is your company involved in offering tourism services to visitors?
3. What kind of activities and services are you offering for your tourism customers?
4. What do you consider the assets of your company in attracting tourists to your winery?
5. How do you promote your wines (primary products) on local and international markets?
6. How do you promote the tourism services of your company?
7. Which are the benefits that wine tourism brings to your company?
8. Do you plan a further expansion of your tourism services and offered facilities?
9. Do you consider that wine products and wine tourism can promote Moldova as a tourist destination on international level?
10. Do you think that wineries and wine tourism have contributed to the development of country image? If Yes, how?, if No, why?
11. Do you think consumers of your products in export markets are potential clients/visitors to your company and Moldova in general?
12. As our country (Moldova), does not have popular touristic attractions (sea, sand, mountains) can wine tourism contribute to partially cover the lack of them?
13. Do your company take actions to maintain tourism activity above specific season of wine tourism (summer, autumn)?
14. What is your relationship with the Tourism Agency and Non-Governmental organizations promoting wine tourism and tourism in general?
15. Do you consider that the inclusion of the Moldavian Wine Roads into European/Romanian routes will have beneficial effect? Are you interested in this program?

16. Do you encounter any barriers for the development of wine tourism in Moldova?
17. Do you encounter any barriers in promoting wine products and wine tourism at national and international levels?

Additional questions that were asked to the Tourism Agency representative:

1. What is the role of Tourism Agency for the development of wine tourism?
2. How do the Tourism Agency and other non-governmental and governmental organizations from Moldova promote the tourism and wine tourism in Moldova?
3. What are the problems encountered by Tourism Agency in promoting Moldavian Tourism and wine tourism?
4. How do wineries and wine companies contribute to the promotion of Moldova's image at national and international levels?

Appendix 2: The Travel & Tourism Competitiveness Index 2015: Europe and Caucasus

Country/Economy	TTC INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
SOUTHERN AND WESTERN EUROPE							
Spain	1	1	4.09	5.97	6.11	4.87	5.26
France	2	2	4.52	5.44	6.52	4.96	5.55
Germany	3	3	5.32	6.06	6.85	5.18	5.51
Switzerland	5	6	5.76	6.32	6.50	5.64	6.03
Italy	6	8	3.59	5.68	6.27	4.45	5.14
Austria	7	12	4.94	6.47	6.97	5.09	5.70
Netherlands	8	14	5.44	6.16	6.24	5.13	5.96
Portugal	9	15	4.54	6.33	6.06	5.18	4.97
Belgium	13	21	4.71	6.18	6.49	5.03	5.47
Luxembourg	16	26	5.73	6.46	6.26	5.16	6.09
Greece	18	31	4.04	5.49	6.57	4.75	4.71
Croatia	19	33	3.65	6.00	6.33	4.41	5.03
Cyprus	20	36	4.72	6.00	5.80	5.16	4.63
Slovenia	23	39	4.03	6.20	6.05	4.69	5.07
Malta	24	40	4.76	6.03	6.35	4.61	5.24
Montenegro	33	67	4.39	5.69	5.71	4.85	4.42
Macedonia, FYR	34	82	4.87	5.75	5.99	4.47	4.47
Serbia	35	95	3.38	5.46	6.04	4.29	4.45
Albania	36	106	4.11	5.34	5.22	4.68	4.07
Southern and Western Europe average			4.56	5.95	6.23	4.87	5.14
Europe standard deviation			0.69	0.35	0.41	0.35	0.59
NORTHERN AND EASTERN EUROPE							
United Kingdom	4	5	5.70	5.44	5.83	5.29	6.09
Iceland	10	18	4.96	6.54	6.07	5.49	5.88
Ireland	11	19	5.37	6.18	5.80	5.27	5.28
Norway	12	20	5.44	6.10	6.17	5.24	6.14
Finland	14	22	5.60	6.70	6.31	5.43	6.37
Sweden	15	23	5.22	6.10	5.94	5.30	6.17
Denmark	17	27	5.28	5.88	6.11	5.47	6.18
Czech Republic	21	37	4.35	5.71	6.73	4.75	5.19
Estonia	22	38	5.13	6.04	6.25	5.12	5.71
Hungary	25	41	4.28	5.79	6.61	4.79	4.93
Russian Federation	26	45	3.98	3.95	6.69	4.83	4.83
Poland	27	47	4.35	5.86	6.21	4.80	4.90
Bulgaria	28	49	4.22	5.24	6.70	4.72	4.76
Latvia	29	53	4.59	5.79	6.17	5.18	5.60
Lithuania	30	59	4.48	5.56	6.81	4.96	5.29
Slovak Republic	31	61	3.92	5.55	6.42	4.75	5.05
Romania	32	66	4.11	5.42	5.94	4.56	4.36
Moldova	37	111	3.90	5.43	6.26	4.50	4.23
Northern and Eastern Europe average			4.72	5.74	6.28	5.03	5.39
Europe standard deviation			0.62	0.59	0.32	0.32	0.66
Europe and Caucasus average			4.61	5.76	6.20	4.90	5.04
Best performer (global)			6.13	6.70	6.97	5.64	6.37

Source: World Economic Forum, The Travel & Competitiveness Report 2015, pp. 10

Appendix 2: The Travel & Tourism Competitiveness Index 2015: Europe and Caucasus (Cont.)

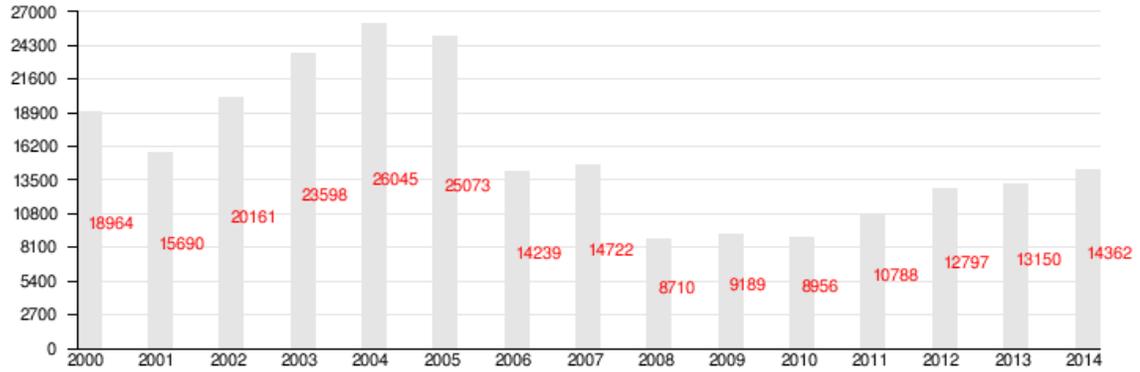
Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Profitability of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
SOUTHERN AND WESTERN EUROPE									
Spain	5.89	3.93	4.22	4.61	4.91	5.54	6.58	4.59	6.69
France	5.16	4.22	2.95	4.67	4.98	5.78	6.15	4.80	6.56
Germany	4.94	4.24	3.62	4.90	4.93	5.99	5.61	4.41	6
Switzerland	5.64	4.11	2.57	5.63	5.03	6	6.35	4.32	2.93
Italy	4.62	4.09	3.49	4.34	4.26	4.65	6.66	4.60	6.51
Austria	5.52	3.99	3.49	5.13	4.01	5.42	6.83	4.07	2.92
Netherlands	4.66	4.25	3.56	4.81	4.89	6.21	4.62	3.19	3.51
Portugal	5.46	4.21	4.23	4.42	3.91	4.54	6.12	3.70	3.71
Belgium	4.47	4.13	3.73	4.28	3.83	5.96	5.65	2.65	3.67
Luembourg	4.64	4.25	4.10	5.23	3.59	5.73	4.67	3.09	1.62
Greece	5.36	4.09	3.93	4.19	4.25	4.01	6.08	3.49	2.82
Croatia	4.51	4.14	4.28	4.38	3.06	4.20	6.35	3.80	2.67
Cyprus	5.96	3.75	3.97	3.92	3.48	4.91	6.77	2.66	1.88
Slovenia	4.93	3.70	4.34	4.74	2.44	5.13	5.72	3.87	1.40
Malta	6.03	3.94	4.22	4.17	3.83	4.98	5.61	2.22	1.44
Montenegro	4.57	2.44	4.48	4.30	3.03	3.51	5.84	2.76	1.09
Macedonia, FYR	4.41	2.36	4.55	3.65	2.39	3.25	4.58	2.15	1.30
Serbia	3.83	2.39	4.56	4.08	2.13	2.95	4.50	1.90	1.61
Albania	4.03	2.34	4.38	3.60	2.16	3.01	3.94	2.03	1.14
Southern and Western Europe average	4.98	3.71	3.93	4.48	3.74	4.83	5.72	3.38	3.13
Europe standard deviation	0.65	0.72	0.54	0.52	0.99	1.08	0.87	0.95	1.95
NORTHERN AND EASTERN EUROPE									
United Kingdom	5.10	4.24	2.73	4.79	5.12	5.51	5.08	4.79	5.90
Iceland	5.89	4.38	3.59	4.92	4.67	4.35	6.28	3.63	1.53
Ireland	5.25	4.53	3.69	5.31	4.16	4.89	6.10	2.79	2.82
Norway	5.14	3.97	3.23	5.22	5.01	3.81	5.49	3.96	2.22
Finland	4.57	4.10	3.71	5.25	4.41	4.83	5.02	3.16	2.13
Sweden	4.70	4.07	3.38	5.03	4.52	4.76	4.84	3.20	2.93
Denmark	4.31	4.34	3.31	4.92	3.87	5.52	4.67	3.45	2.18
Czech Republic	4.61	4.15	4.47	4.90	3.13	5.15	5.44	2.59	2.30
Estonia	5.76	3.65	4.62	4.73	2.97	4.39	5.87	2.69	1.55
Hungary	5.13	4.15	4.60	5.16	2.71	4.45	5.02	2.72	2.22
Russian Federation	4.33	2.48	4.99	3.70	4.42	3.09	4.65	3.77	3.32
Poland	4.10	4.08	4.94	4.62	2.57	4.08	4.44	3.14	2.77
Bulgaria	4.18	3.87	5.08	4.62	2.46	3.26	6.06	3.44	1.96
Latvia	4.64	3.97	4.84	4.59	3.12	4.22	5.08	2.55	1.33
Lithuania	4.37	3.99	4.87	4.42	2.39	4.55	4.24	2.44	1.50
Slovak Republic	4.04	3.89	4.51	4.49	1.78	4.22	4.94	3.31	1.42
Romania	4.34	3.91	4.89	4.35	2.34	3.10	5.01	2.70	2.07
Moldova	3.82	1.96	4.80	4.22	1.90	2.77	3.29	1.75	1.08
Northern and Eastern Europe average	4.68	3.87	4.24	4.73	3.42	4.27	5.08	3.11	2.29
Europe standard deviation	0.58	0.64	0.75	0.41	1.10	0.81	0.73	0.69	1.09
Europe and Caucasus average	4.76	3.61	4.19	4.47	3.43	4.33	5.14	3.09	2.57
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

Source: World Economic Forum, The Travel & Competitiveness Report 2015, pp. 11

Appendix 3: Number of international tourists arrivals in Moldova according to different sources

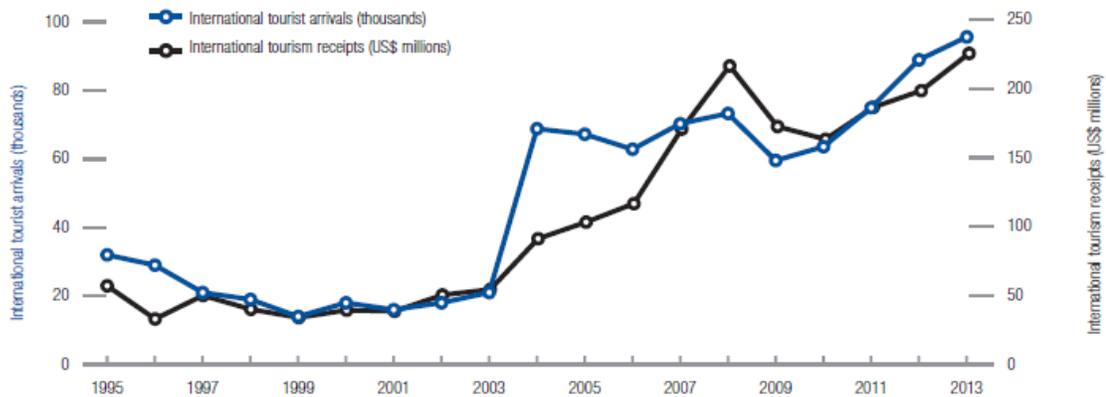
The number of International Tourists according to Tourism Agency, National Development Strategy 2020 and Wikipedia



Source: Tourism Agency 2014

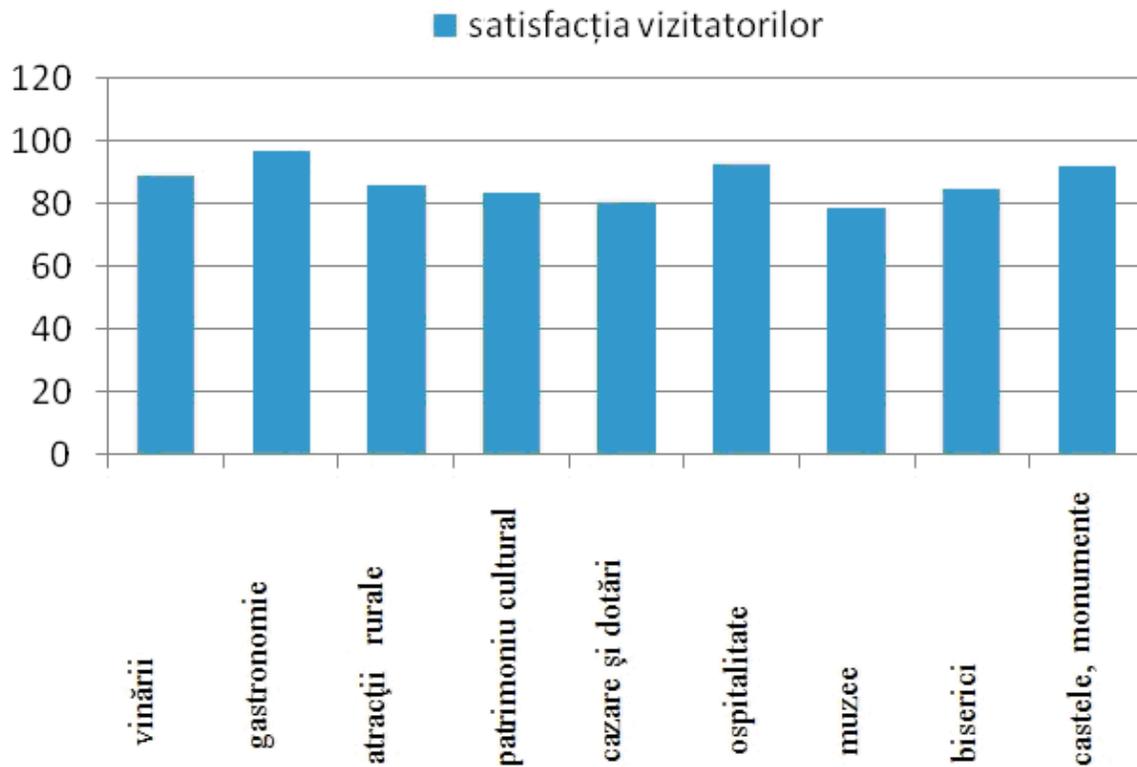
The number of International Tourists according to WEF Global Travel & Tourism Report, Association of Tourism Development in Moldova

Evolution of the T&T Industry Over Time



Source: WEF Global Travel and Competitiveness Report 2014 pp 236

Appendix 4. International visitors satisfaction towards Moldavian touristic attractions



Source. CEED II survey, 2012 in Tourism 2020, 2014 pp. 9

Satisfaction towards visiting:

- Wineries - 86,7%
- Gastronomy – 98,2%
- Rural Attractions – 83,1%
- Cultural heritage – 81,9%
- Accommodation and utilities – 79,9%
- Hospitality – 92,4%
- Museums – 79,1%
- Churches and Monasteries – 82,7%
- Castles and Monuments – 91,5%