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**DEVELOPMENT OF SREMSKI KARLOVCI WINE TOURISM AND
INTEGRATION IN THE REGIONAL TOURISM OFFER***Iva Škrbić¹, Vaso Jegdić², Srđan Milošević³, Dragica Tomka⁴***Summary**

Integration and globalisation processes are unavoidable in all fields of business economy, including tourism. Potential success of wine tourism in Sremski Karlovci should be based on diversification of products that entails an influx of tourism and winemaking into other fields of economy. During the development of wine tourism offer, it would be advisable to consult the experiences of the developed wine region and to use their models, which is done in this paper, via benchmark analysis of offers of Sremski Karlovci wineries with those of the Ontario region (Canada) and the place of Villány (Hungary). The goal of this paper is to establish the possible directions of development of the integral product of wine tourism of Sremski Karlovci as a prerequisite for integration into the regional tourism offer. The research indicates that wine tourism offer of Sremski Karlovci is underdeveloped. A large number of product diversification fields are not recognised. The future development of Sremski Karlovci wineries should be based on conquering of those very fields. Such a tourism product could more easily be integrated into the regional wine tourism offer.

Key words: wine tourism, integration, diversification, tourist product

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Introduction

In the circumstances of the growing globalisation of world economy, each country strives to use its comparative advantages by transforming them into competitive advantages in order to ensure a long-term increase of life standard of inhabitants. European integration and globalisation require leaving behind an old way of thinking based on national particularities and territorial limitations. According to Kenichi Ohmae, region-state is the best unit of prosperity on the global stage, which can be further advanced by putting all regions under a large umbrella, such as European Union. It can stimulate free trade, legislative consistency and market integration (Ohmae, 2007). Knowing and monitoring these processes can help in finding waypoints for development of tourist destinations and respective specific positions of destination-states on tourism market. The last twenty years have seen a growing importance of service sector in the international exchange, among which tourism figures prominently (Arnaut, 2009). As regards tourist demand, changes have occurred in the structure of tourist needs, which thus go beyond the frames of the tourist model and shape tourism in accordance with the new life pattern and new values formed under the influence of globalisation (Pavlić, 2004). Changes in demand lead to diversification of activities within and without the borders of tourist industry.

Regionalisation goes in parallel with globalisation and entails a regional integration of global proportions. According to Arnaut (2009), the process of globalisation, European integration and tourism development need to be understood integrally. From the domination of the European micro-region world tourism has been opening new regional units with an accelerated tourist growth (Milenković, 2004). European tourism is developing regionally and that is why leading stakeholders in tourism must strive towards cooperation and inclusion into institutions, organisations, networks and funds that can raise the offer of wine tourism to an international level. One should also take into account the attitude of the World Tourism Organisation (UNWTO, 1998) that cites globalisation and localisation as the two most important trends that direct the tourist industry. Inclusion into processes of tourism integration and globalisation requires the development of such assortment of products and services of wine tourism that will completely respond to the needs of today's tourists. This primarily concerns raising the level of competitiveness and, accordingly, growth of quality of tourist services. The quality of services in tourism is conditioned with the technological factor reflected in the level of technical and technological amenities, quality of raw resources, position of building structures et cetera, as well as the subjective factor represented by knowledge, experience, will and capabilities of people working in tourism and other complementary sectors (Škrbić et al., 2010).

The development of competitive wine tourism offer of Sremski Karlovci is an entry point towards European integrations and, consequently, the global tourism market. Modern tourism is characterised by two tendencies: globalisation and diversification (Avelini, 2001). Globalisation as a supranational process changes fixed political, economic, social and cultural relations (Gligorić, 2007). Globalisation represents merging of national economies into a single (integral) economy (Koncul, 2004). The question is: what should wine tourism offer of Sremski Karlovci be like for European integration in this segment

to be successful and to realise a recognisable European identity? The first necessary step is a realistic assessment of possibilities to include Sremski Karlovci in European integrations through wine tourism. The problems on that way should be clearly defined and their solving should be an incentive to further development of processes of integration and globalisation. Integration and globalisation affect the growth of competition and own competitiveness should be based on the quality of offer of wine tourism. Wine tourism is widely recognized as a unique tourism product for visitors who are seeking authentic multi-dimensional experience, but at the same time it represents an innovative business opportunity for small-scale wine producers who wish to expand their wine production and meet the international demand (Kesar, Ferjanić, 2010; Mancino, Presti, 2012). Tourist product of wine tourism is here treated as an integral tourist product. It represents a whole system of products and services that are more or less based on or related to winemaking, in the function of meeting the needs of tourism. That is why it incorporates wine, wineries with sampling option, events, wine routes, souvenirs, educational courses and workshops, gastronomy, etc. Because of this, with the latest technology being introduced into Karlovci wineries, an important factor is played by not only the tradition and several centuries of experience, but also geographical advantages. The Danube reflects the sunlight and together with the specific microclimate gives the grapes grown in Sremski Karlovci 1-2% more sugar compared to grapes grown elsewhere in Vojvodina (Maksimović, 2013).

To take part in the globalisation process in tourism means to be recognisable in globalisation. The globalisation process simultaneously creates both threats and opportunities to the economic development of small countries in transition. Which of these influences will prevail chiefly depends on the ability of each country to realise necessary reforms for the increase of competitiveness (Arnaut, 2009). This competitiveness in contemporary wine tourism requires quality of wine as an obligatory condition, but also the quality of the integral tourist product – autochthonism, authenticity, interactivity and wholeness of tourist experience, which gives a chance to smaller countries to take part in wine tourism currents with their respective offers. Development of wine tourism affects the regional economy and the basic stimulus of wine tourism development is understanding of impact of wine tourism on the region (Škrbić, 2010). Thus, local development of wine villages, places and regions becomes a key to regional integrations. In the basis of tourist travel lays the motive to get to know that which is different and as yet unexperienced, hence diversity as an imperative in tourism. The tourists come to a certain area to experience and feel its character, food, way of life, cultural attractions (Pivac, 2012). This diversity, uniqueness, unrepeatability gives location to a certain place as well as a certain specific quality (Vojković et al., 2005). Research shows that there is a strong correlation between the tourist experience during wine sampling (sampling in contemporary wine tourism also includes animation, education, gastronomy, etc.) and loyalty to that wine brand (Bruwer et al., 2013). In wine tourism, wine brand is, at the same time, the brand destination itself in the function of local development. Inclusion of local population into wine tourism development, cooperation and networking are cited as key factors (Kesar, Ferjanić, 2010; Zamora, Bravo, 2005). This can also be the case of a diversified brand extension – expansion onto a completely new brand in the new industry

(Rakita, 2008). The offer of Sremski Karlovci wine tourism needs to be built through the symbiosis of all available resources, activities and industries, which opens a wide range of developmental possibilities through diversification of offer of wineries into other segments of economic activities. Experience of development of other successful wine regions can greatly help during the planning of development of Sremski Karlovci wine tourism offer and its inclusion into regional wine tourism networks.

Methodology and data sources

The subject of this research is the assortment of products and services of wineries of Sremski Karlovci in the field of wine tourism. Fifteen wineries were included, their tourism offer analysed from the aspect of diversity. The research employs analytic-synthetic, bibliographic-speculative and empirical methods. Data required for analysis were collected through interviews and surveys of owners/managers of those wineries in Sremski Karlovci that opted for the development of wine tourism. As secondary data sources, available internet sites relevant for target field were used, official reports of wineries and their associations, as well as bibliography. Data collected were processed by means of a comparative benchmark analysis, with nine analysed groups of factors relevant from the aspect of building an integral wine tourism product. This analysis did not include the quality of wines themselves, the starting assumption being that all wine tourism destinations produce wines of satisfactory quality. Scientific contribution of the paper is reflected in the synthesis and in-depth insight in the field of diversification and blending of winemaking and tourism products, as well as in an overview of ways to create more complex chains of value. The research results indicate possible guidelines for further development of the integral wine tourism product of Sremski Karlovci in order to enable a successful integration into regional tourism trends.

Quantitative indicators of wine tourism development

The global growth of wine tourism is difficult to monitor, seeing as there is no integrated database on the number of visits and tourist frequency on a global level. Due to the fact that wineries in certain regions with developed wine tourism are often joined in various forms of clusters, monitoring the activities of wine tourism is primarily the task of those clusters, hence the only currently available official data comes from certain clusters in regions with developed wine tourism. One must take into account that this data is a mere fragment of global activities of wine tourism, but can be clear indicators of development trends. The following question is that of which categories are the most representative of the increase of interest of tourists in wine tourism. As of now, there are no standardised aggregates of economy/tourism that can unequivocally assess the state of wine tourism, one of the reasons being the specificity of wine tourism and tourism in general, where certain forms of tourism intertwine in multiple ways, preventing any singular definitions. There is no universal definition of wine tourism (Dedanski, Puzić, 2010). In practice, this means that the tourist who visits a village and enjoys the walk by the stream, watches birds, acquaints with the customs of the local population, eats local food and takes part in grape harvesting in a vineyard presents at the same time the rural, eco-, ethno, gastro, cultural and wine tourist. Certain experts in the field of tourism believe that one of the most reliable indicators of wine tourism development would be the number of

wine roads and their development, as well as establishment of certain rules and criteria to be used during monitoring.

Socio-economic benefits from wine tourism include a larger number of visitors, a longer stay and increased expenditure, greater satisfaction of visitors and more cellar wines sold (Pivac et al., 2009). In respect to this, France has passed a wine tourism development strategy the goal of which is to improve the cooperation between wine producers and the tourist industry (Hall, 2013). The results of the study reveal that the key factor of success is a harmonised marketing effort and strategic partnership between the stakeholders in wine tourism offer (Jones et al., 2013). However, as these presumptions were made only as a possibility of wine tourism monitoring development, not the current realistic possibility, this paper is going to feature available data on the economic impact of winemaking and wine tourism of Canada and the Ontario region in the function of analysis of possible directions of advancement of wine tourism offer and services in Sremski Karlovci.

In Canada, the industry of wine and grape production generates a yearly business income of 4.7 billion dollars, 879 million dollars in tax incomes and around 1.2 billion dollars of income in payable earnings. All of the above generates 6.8 billion dollars of overall economic impact. Each sold bottle of Canadian wine generates an average of 21.36 dollars of business income, 3.99 dollars of tax incomes and 5.41 dollar of earnings payable to the work force (Rimerman, Eyler, 2013). The data cited in the graph 1 below regarding the two most prominent Canadian wineries speaks in favour of the trend of growth of business income and employment in Canada in the field of winemaking in the period of 2005 to 2011.

Graph 1. Income and number of employees in companies of Constellation Brands and Andrew Peller, Ltd.



Source: Rimerman, Eyler, 2013.

Statistical data on partial shares of certain segments of winemaking and wine tourism from the aspect of incomes, employee earnings and number of employees, as well as other relevant indicators are given in Table 1.

Table 1. Economic influence of wine tourism of Canada and the Ontario region

Element	Ontario region	Canada total
INCOMES (in dollars)		
Winery income (on account of all activities and products)	530,774,000	1,145,671,000
Retail and restaurant industry income	77,204,000	230,950,000
Tourism (wine)	248,195,000	475,934,000
Wine research/education/consulting	5,452,000	8,337,000
Federal tax income	192,352,000	415,209,000
Local tax income	252,023,000	463,530,000
Other	369,386,000	715,555,000
Indirect income	524,949,000	1,036,050,000
Induced income	544,411,000	1,088,726,000
Overall income	2,744,746,000	5,579,962,000
Earnings (in dollars)		
Wineries	106,880,000	184,611,000
Restaurant industry and retail	23,225,000	64,238,000
Tourism	100,228,000	189,204,000
Wine research/education/consulting	3,442,000	5,854,000
Other	63,646,000	189,291,000
Indirect earnings	160,867,000	302,704,000
Induced earnings	135,163,000	255,047,000
Overall earnings	593,451,000	1,190,949,000
NUMBER OF EMPLOYEES		
Wineries	2,269	3,839
Restaurant industry and retail	1,421	3,725
Tourism	2,864	5,520
Wine research/education/consulting	78	139
Other	1,747	5,474
Indirect	3,143	6,585
Induced	2,852	6,088
Total employees	14,374	31,370
TOTAL ECONOMIC IMPACT (in dollars)	3,338,197	6,350,210
NUMBER OF WINERIES	130	466
NUMBER OF WINE TOURISTS	1,900,000	3,000,000
NUMBER OF GRAPE PRODUCERS	478	1,308
OVERALL TOURIST IMPACT (in dollars) (includes direct, indirect and induced incomes and earnings on account of wine tourism)	643,798,000	1,218,065,000

Source: Adapted from: Rimerman, Eyler, 2013.

Benchmark analysis and discussion

Benchmark analysis refers to the comparison of a certain subject with a referential subject and establishment of differences and potentials for further development of the compared subject. Benchmark analysis is not about automatic acceptance and application of successful practice of others, but about its creative adaptation to the concrete circumstances (Novović, 2008). In this research, tourist offer, service and product assortment of the Sremski Karlovci wineries were compared with tourist products and services offered by the wineries of the Ontario region in Canada and the town of Villány in Hungary. Seeing as quality grape vine and wine are the first and basic prerequisite for wine tourism development, it is understood that all three observed subjects meet this condition, so comparison is done exclusively according to tourist offer criteria.

Ontario was chosen as a benchmark for several reasons. The first reason was that Ontario wineries entered wine tourism currents less than 20 years ago, though Ontario itself had been recognised earlier as a tourist destination on other accounts, much like Sremski Karlovci. Ontario wineries attracted over 1,000,000 visitors in 2008 (Mikel, 2008), while in 2011 this number reached 1,900,000 (Rimerman, Eyler, 2013). The second reason is extraordinary results that the wineries in this area have achieved in wine tourism from the aspect of diversification and development of tourist products and services offered to wine tourists. Winemakers of this region claim that they do not sell bottled liquid, but culture turned into wine, best food and best art (Kislenko, 2007). All products and services have been carefully chosen and designed, characterised by local origin, authenticity and originality on the one hand, while on the other they have a strong market potential, economic validity and a high level of competitiveness on the global tourist market. The wineries of the Villány region were taken as one of the comparative benchmarks due to similarity with Sremski Karlovci in terms of size, population number and other natural and geographical features, but also progress achieved in wine tourism development in the same broader region as Sremski Karlovci.

The analysis gives information on the areas where there is potential for further development and diversification of assortment of the Sremski Karlovci wineries, but also gives concrete examples of good international practice that can be applied, with adequate corrections, on the territories of Sremski Karlovci. All data related to products and assortment of wineries of Ontario and Villány were obtained via websites and presentations of wineries and their associations, case studies and official reports. Data related to products and assortment of Sremski Karlovci wineries were obtained through a direct contact of researchers with the owners of 15 wineries and through websites of wineries and associations. The research encompassed those wineries in Sremski Karlovci that have (at least partially) expanded business into tourism and that are interested in further development in the field of wine tourism. Research was conducted in the period of December 2013 to March 2014.

With the purpose of systematisation and benchmark analysis, all services and products identified in the wineries of Sremski Karlovci, Ontario and Villány have been sorted in nine groups (Table 2).

Table 2. Parameters of comparison

No.	Group of products and services	Benchmark analysis parameters
1.	Bottled wine	Sale: of bottled wine, bottles of different volume, specialised packages, wine brand, existence of wine that is specific for a given area
2.	Public events and festivals	Frequency, number of visitors, programme production, involvement of wineries
3.	Winemaking, art and music	Existence of programmes and services based on the bond of winemaking and painting, diversity, creativity, interactive inclusion of visitors
4.	Wine routes	Wine routes, content, marking, quality and harmonisation of the support material with the routes
5.	Educational programmes, experience and sport-recreation programmes	Number of routes, thematic diversity, level of interactivity, frequency of events
6.	Wine sampling	Sampling possibility, type of sampling, content and additional services, place of sampling
7.	Restaurants and gastronomic delights	Existence of restaurants, offer of gastronomic specialties, thematic cuisine evenings
8.	Internet sale	Possibility to order and pay via internet
9.	Web sites and winery	Existence of web sites, quantity and quality of information

Source: author's research

The analysis has been done separately for each group of products and services and consists of comparative review of products and services for all three groups of wineries (Tables 3-11).

Table 3. Benchmark analysis of bottled wine

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<ul style="list-style-type: none"> -bottled wine, greater volume (1l; 0.75 l) -bottled wine, smaller volume (0.25 l) -each winery is known for a certain brand and brand names usually carry a family name or nickname. -the most famous wine is <i>bermet</i>, which is made from over 20 kinds of medicinal herbs -there are no specific wine packages. 	<ul style="list-style-type: none"> -a large offer of white (Olaszrizling, Hárslevelű and Chardonnay) and red (Kékportó, Kékfrankos, Pinot Noir, Merlot, Cabernet franc and Cabernet sauvignon) bottled wines (1 l; 0.75 l) -old Hungarian sorts are also being experimented with. -specialised packages of best quality wines made exclusively for specialised shops, connoisseurs and collectors. -packages of "wine library" for buyers with the subtlest taste (Laposa, 2001) -Wine packages designed and packed as presents and souvenirs are also offered. 	<ul style="list-style-type: none"> - bottled wine of greater volume (1 l; 0.75 l) - bottled wine of smaller volume (0.25 l) -every winery known for a certain wine brand -the most famous wine is "Icewine" made from frosted grapes -specially designed wine packages as presents and souvenirs -Loyalty club offers a discount with the possibility of arranging purchase and delivery of chosen wines on a quarterly basis.

Source: author's research

The Sremski Karlovci wineries offer a large number of bottled wines in adequately designed bottles of various volumes. However, the offer hardly ever includes online ordering, nor does it include specially designed wine packages. Further development should be directed towards the introduction of latest technologies into sale sector, but also towards creating various packages that would consist of more kinds of wine of various volumes that would represent the Karlovci offer and be appropriate souvenirs or presents.

Table 4. Benchmark analysis of public events and festivals

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<p>-”Karlovci grape picking” festival is organised to celebrate the grape harvest.</p> <p>-100,000 visitors yearly.</p> <p>-Wineries do not take part in the programme production and are represented only through wine sale.</p>	<p>-“Villány Red Wine Festival” is held on odd years to celebrate the grape harvest and is so popular that organisers are looking for new locations.</p> <p>-A range of events under the name of “Bacchus Days “, are held on even years.</p> <p>-A larger number of lesser events independently organised by wineries, such as “Gere jazz festival”.</p> <p>-Result – inexistence of tourist season, with cellars and taverns open throughout the year.</p>	<p>-The greatest events are held around the middle of the year. They include over a 100 events during ten days. Tourists can sample best wines, enjoy in gastronomic specialties with music and parades.</p> <p>-Festivities at the end of January in honour of the frosted grape harvest for “Icewine” include a greater number of events taking place at various locations.</p> <p>-Exhibitions, seminars, celebrations and prize awards are organised in wineries themselves.</p> <p>-Also underway is the development of quality events in early spring and late autumn that will attract tourists in the off-season, as well.</p>

Source: author’s research

In Sremski Karlovci there is only one wine tourism event that does not adequately include wineries and winemakers. Creating a larger number of events, especially in the off-season, would significantly contribute to a greater interest, greater attendance and greater tourist demand. The tradition of Sremski Karlovci offers the possibility to conceive events of all kinds that can be blended with the wine experience.

Table 5. Benchmark analysis of the relation of winemaking and the art of painting

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<p>-The owner of the “Art et vinum” winery is an academic painter who uses his art pieces as bottle labels. “Days with the artist” offer the visitor the possibility to create art works with the owner of the winery.</p> <p>-In winery premises, there are no exhibitions or other art events.</p> <p>-Music and wine are related only through concerts within the “Karlovci grape picking” event.</p> <p>-One of the wineries offers traditional string band services after a prior reservation.</p>	<p>-Gere jazz festival presents a blend of wine, food and jazz music.</p> <p>-Rose Marathon is a summer festival of concerts, leisure, games and wine</p> <p>-European Convivial Song Festival celebrates 21st anniversary and gathers male choirs and soloists.</p> <p>-Some of the wineries have musical programmes during the samplings.</p>	<p>-Competition of artists for the best “Hildebrand” winery label. The best artworks are on the bottles of the most quality wines in limited and controlled series.</p> <p>-Wineries are hosts to a great number of exhibitions.</p> <p>-Music events take place at winery properties, such as the “Jazz & Blues” festival.</p>

Source: author’s research

The blend of wine and the art of painting is not represented in Sremski Karlovci and is, apart from one case, absolutely unknown. Vineyards and sampling places can be made into extraordinary exhibition spaces useful to both the artist and the winemakers and, when weather opportunities would allow, the same could be done with vineyards. Despite the large number of concerts offered to tourists in Sremski Karlovci none of them is in any way related to wine or wineries. The Karlovci wineries have beautiful outdoor and indoor locations that can be used in creation of music- and wine-based experience.

Table 6. Benchmark analysis of wine routes

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<ul style="list-style-type: none"> -The recent period has seen an improvement in elementary infrastructure, especially the wine signalisation. -Waypoints and roadside signs mark 15 wineries willing to receive tourists. -Brochure “Wine road of Sremski Karlovci and Fruška gora” in Serbian and English and the map of the Karlovci wine road (Janković, 2012). This is the first marked wine road out of the total of ten in Serbia. -In 2008 the project of “Development of integral tourism based on wine roads”, financed by the EU within the Hungary-Serbia Cross Border Cooperation programme and including the wineries of Sremski Karlovci was completed. However, in practice, things never changed, thus the routes mentioned in the project exist only on the paper. 	<ul style="list-style-type: none"> -1994 saw the foundation of the Villány Siklós wine road – first of its kind in Hungary. It is 30 kilometres long and it initially encompassed 8 settlements, but in time this number grew. It is characterised by a good synthesis of elements of both wine tourism and other, tourist, cultural and natural sights, serving as a basis of local economic development. -Most wineries are located on the road itself and are relatively close to one another. They are open for samplings and some wineries offer accommodation, as well (www.visitbudapest.travel). 	<ul style="list-style-type: none"> -Well marked wine routes with diverse content. Road signs for routes were placed by highways and other traffic lines. -Adequate catalogues and brochures offer valid information. Gastronomic brochures were written in such a way that they complement the wine route experience. -Wine routes are continuously being developed and marked.

Source: author’s research

Wine routes are an indispensable part of offer of every wine region and their advancement and adequate promotion is a necessity if the Karlovci wineries wish to improve their offer and become competitive actors on the regional wine tourism market. Wine routes imply creative and substantial routes, clearly marked and harmonised with various materials that give all necessary information for a complete enjoyment in the overall route offer.

Table 7. Benchmark analysis of educational programmes and experience programmes

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<p>-“Art et vinum” winery organises “Days with the artist”, offers an art workshop and the interested visitors can participate in work on a goat farm. Information on the abovementioned can be obtained only upon a direct enquiry with the winery owner.</p> <p>-Sremski Karlovci are also a center of embroidery, weaving and gugelhupf cake. There are workshops for gugelhupf making, as well as a presentation of ceramic souvenir creation methods, but joint experience programmes have not yet been offered.</p>	<p>- W i n e r i e s organising local excursions.</p> <p>- W e l l n e s s content on the basis of grapes and wine.</p> <p>-Wine museum.</p> <p>-Bicycle rent, h o r s e b a c k riding and Nordic walking with tours of wineries.</p> <p>-Boat rides along the Drava river with sampling of local wines.</p>	<p>- A number of various programmes. Some of them are based on winemaking and gastronomy and are aimed at tourists coming for short vacations or one-day excursions. Visitors have cooking lessons where they themselves cook using local ingredients under the guidance of hosts, chefs or other experts in culinary arts. Also on offer is a three-day “Canadian Wine & Culinary tour” where one can cook with different chefs and wines every day.</p> <p>-Some of the programmes show the very process of winemaking, with the visitors taking an active part in it.</p> <p>-Also available are programmes of education that cover the fields of enology and sommelier work.</p> <p>-If visitors wish to get deeper into smells and tastes of wine, they can visit the wine-mixing workshop, where they get three basic kinds of wine and the necessary equipment to make a combination according to their own preference, bottle it, put their own recipe label on it and take it as a souvenir.</p> <p>-There is also a special workshop where visitors get three plates with three different dishes and three basic kinds of wine, so they can taste and judge the suitability of dishes with various wines for themselves.</p>

Source: author’s research

Educational programmes, experience and sport/recreational programmes are mostly unrepresented in the Sremski Karlovci wineries. The exception is the “Art et vinum” winery that organises a yearly “Days with the Artist” event, where visitors can get involved in creative processes. However, this programme has more of a sporadic character and not that of an event created to complete the assortment of this winery. The development of services of this type, in addition to winemaking, can go in the direction of relating wine with weaving, embroidery, ceramics, but also gastronomy and enjoyment of nature.

Table 8. Benchmark analysis of wine sampling

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<ul style="list-style-type: none"> -Samplings in all wineries have entered the wine tourism currents. This is the basic (if not the only) service that wineries offer to tourists. Between 3 and 7 wines are sampled, usually with gastronomic specialties, depending on the wine type. -Samplings take place in wine cellars or other adequate premises or vineyards themselves. -Wineries plan to build vaulted cellars in vineyards for tourism needs. -Every sampling is guided and includes a discussion on wine and winemaking adjusted to the visitor structure, their previous knowledge and interests. 	<ul style="list-style-type: none"> -All wineries offer samplings, where one can get to know the winery and wine sorts -They take place in wine cellars, adapted halls or vineyard. -Transfer of visitors from wine cellar to vineyard is done by horse-drawn coaches or old-timer buses, which adds to the attractiveness of the experience. -Cold and/or hot serving gastronomically agrees with the wines sampled. -During the guided sampling, the host also reflects on the technology of wine production. -The possibility of organising feasts and events with the aim of acquaintance with winemaking customs and traditions. 	<ul style="list-style-type: none"> -All wineries offer wine sampling. -Wine sampled in wine cellars, specialised premises or vineyards -3 to 7 wines are sampled with adequate food. -Samplings were guided, with an added educational aspect.

Source: author's research

As regards wine sampling, the wineries of Sremski Karlovci follow global trends and it can be said that the visitor actually enjoys both the taste of wine and the story of the host. Further improvement of locations where sampling takes place, training of host staff and development of the story that follows the sampling process is necessary, as only continuous advancement can help maintain the market position.

Table 9. Benchmark analysis of restaurants and gastronomic offer

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<ul style="list-style-type: none"> -Only one winery owns a restaurant, while some wineries also offer food servings consisting of cold cuts, fresh vegetables and various kinds of cheese. Cooked meals are not on the menu. 	<ul style="list-style-type: none"> -Almost every winery offers cold servings and/or warm meals. -Sporadically – different thematic gastronomic evenings, with an accent on local wines and specialties. -Cooperation of local wineries and restaurants offering local wines. 	<ul style="list-style-type: none"> -In Canada, there is a generally growing interest in gastronomy and culinary arts (Thach, 2007). Ontario wineries follow this trend and offer a wide range of gastro-thematic evenings with adequate wines.

Source: author's research

Restaurants and gastronomic delights, such as restaurants opened within wineries or tighter connections between restaurants and wineries would have very positive effects on the development of offer and winery business in Karlovci, as well as on the development of wine tourism. Further development of assortment and distribution of Karlovci wineries should go in that direction.

Table 10. Benchmark analysis of possibilities of internet sale

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<p>-A small number of wineries offers the possibility of ordering and paying through the internet.</p> <p>-The website of www.vinozanas.rs offers the possibility of online wine ordering from the four wineries of Sremski Karlovci.</p>	<p>-Some wineries offer the possibility of online order and payment exclusively for the Hungarian market. Wineries cooperate with a great number of specialised shops for wine sale and distribution.</p> <p>-Hungarian Wine House website (www.hungarianwinehouse.co.uk) offers the possibility of UK and optional EU order.</p>	<p>-Order and selling via internet is commonly practiced.</p> <p>-There are specialised shops owned by the wineries themselves in several different cities and countries around the world.</p>

Source: author's research

Internet sale of Karlovci wines is only taking its baby steps. Taking into account the necessary technology, time and investments, one of the alternatives can lie in an accelerated development of the website of www.vinozanas.rs, which should include in its offer the wines of other wineries, in addition to expanding its chain of distribution.

Table 11. Benchmark analysis of websites

Sremski Karlovci wineries	Villány wineries	Ontario wineries
<p>-A large number of wineries in Sremski Karlovci have no websites, which contributes to them not being recognised on the market.</p> <p>-The existing websites of wineries are multilingual and give correct and adequate information.</p>	<p>-The greatest number of wineries has websites most commonly with information in Hungarian language, which narrows down the market of potential visitors and website users.</p> <p>-All wineries and their offer have basic presentations on a multilingual website of the Villány Siklós wine road (www.villanyiborvidek.hu).</p>	<p>-Each winery has a website of its own.</p> <p>-Websites are mostly multilingual, updated and offer a wealth of information about wineries, wines and upcoming wine events, but also information regarding accommodation, transport and other important tourist info.</p> <p>-All wineries are systematically presented on the website of the Wine Country Ontario Association (www.winecountryontario.ca).</p>

Source: author's research

The prerequisite for modern business and market competitiveness is e-business in all of its forms. Quality websites of Karlovci wineries should be indispensable if those wineries are willing to take a more favourable position on the wine tourism market.

Benchmark analysis gave very important information on the areas where there is potential for further development and diversification of assortment of Sremski Karlovci wineries.

Conclusion

Having potential is a necessary, but not a sufficient condition of success and market survival. Quality wines, nice vineyards, The Danube, Fruška Gora and Sremski Karlovci, as a cultural and historical monument are touristically attractive, but wine tourism market demands more than that. The road to a successful integration of winemaking of Sremski Karlovci requires a strong synergic connection in the form of creation of more diverse, creative and interactive packages of products and wine tourism services. Sremski Karlovci wine tourism offer should be built through diversification of offer of wineries into other segments of economic activities. A large number of potential fields of diversification are still unrecognised and unused. The future development of wineries in Sremski Karlovci should be based on targeting these fields with the aim of creating a quality integral tourist product that could be integrated into regional wine tourist offer, together with other wine tourism regions. Such regional integration would also require globalisation of tourist offer, with local tourist values offered on a higher - global level.

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RAZVOJ VINSKOG TURIZMA SREMSKIH KARLOVACA I INTEGRACIJA U REGIONALNU TURISTIČKU PONUDU

Iva Škrbić⁵, Vaso Jegdić⁶, Srdan Milošević⁷, Dragica Tomka⁸

Rezime

Procesi globalizacije i integracije su neminovni u svim privrednim oblastima, pa i u turizmu. Potencijalni uspeh vinskog turizma u Sremskim Karlovcima treba da se bazira na diverzifikaciji proizvoda koja podrazumeva upliv turizma i vinarstva u druge privredne oblasti. Prilikom kreiranja ponude vinskog turizma dobro je konsultovati iskustva razvijenih vinskih regija i koristiti njihove modele, što je u ovom radu i učinjeno putem benčmark analize ponude vinarija Sremskih Karlovaca sa vinarijama okruga Ontarijo (Kanada) i mesta Viljanji (Mađarska). Cilj ovog rada je utvrditi moguće pravce razvoja integralnog proizvoda vinskog turizma Sremskih Karlovaca kao preduslova integracije u regionalnu turističku ponudu. Istraživanje ukazuje da vinsko-turistička ponuda Sremskih Karlovaca nije dovoljno razvijena. Veliki broj oblasti diverzifikacije proizvoda je neprepoznat. Budući razvoj vinarija u Sremskim Karlovcima se treba bazirati na osvajanju upravo tih područija. Tako kreiran turistički proizvod mogao bi lakše biti integrisan u regionalnu vinsku turističku ponudu.

Ključne reči: *vinski turizam, integracija, diverzifikacija, turistički proizvod.*

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