

Key factors for developing sustainable wine tourism in the West Herzegovina Canton

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Abstract: This study aims to provide a situational analysis of the current development of wine tourism in the West Herzegovina Canton, especially highlighting key factors for developing sustainable wine tourism as perceived by winery owners and/or managers. Scientific and professional literature, online sources, and empirical research using the e-Delphi technique were utilised to investigate the topic. In addition to quantitative data analysis, the results were analysed and explained using the PEST matrix. Low interest among public policy stakeholders in its development was identified as the most problematic issue, while the quality of wine was recognised as the most important opportunity. Taking into account all the issues and opportunities, and considering the broader context of the West Herzegovina Canton's development, key factors for developing sustainable wine tourism include: increasing the interest of public policy stakeholders and investments in wine tourism development; implementing comprehensive marketing strategies for the promotion of wine tourism and its placement in the tourist market; encouraging cooperation among all stakeholders, improving communication, and fostering synergy; educating winemakers and other stakeholders directly involved in wine tourism; enhancing ecological wine production and wine quality; expanding capacity and modernising existing wineries; promoting wine tourism and improving the region's image; developing other specialised forms of tourism; advocating for supportive public policies and removing administrative obstacles; and managing the sustainable development of wine tourism. The research limitations included the absence of the Vineyard and Wine Register, the lack of operational tourist boards in three out of four municipalities in the West Herzegovina Canton, and issues with participant engagement during the empirical research. Future research recommendations include verifying the factors listed in the study's limitations and examining the structure of wine tourism at the time, identifying weaknesses, strengths, opportunities, and threats. New empirical studies could uncover additional factors crucial for wine tourism development in the West Herzegovina Canton and Bosnia and Herzegovina.

Key words: Development of wine tourism, sustainable development, West Herzegovina Canton

JEL classification: Z32

1. Introduction

According to UNWTO (2023), oenotourism (wine tourism) is a subset of gastronomy tourism. Many authors concur that gastronomic and oenological tourism have significantly expanded in scope and popularity over the past 20 years (Andrade-Suarez & Caamano-Franco, 2020; Nickova, 2021; Ingrassia et al., 2022). As Getz (2000) described, wine tourism involves mutual benefit and interaction, increasing wine sales, visitor education, attracting new market segments, and valorising natural and cultural values. It enhances destination visitation, develops a new destination image, and generates revenue. Research by Martínez-Falcó et al. (2024b) and Petelca et al. (2022) confirms the significant economic impact of wine tourism, contributing to job creation, and local business growth. Moreover, it serves as a crucial tool for both income generation and the preservation and promotion of the cultural heritage of wine regions, playing a pivotal role in their sustainable development globally. Oenotourism thrives when winemakers actively engage in tourism, offering visitors exceptional experiences, as supported by Getz (2000), Howley & Van Westering (2008), and Del Chiappa et al., (2019); or ‘complex and holistic experiences’ (Garcia Revilla & Martinez Moure, 2021).

The inaugural wine tourism research, which originated in the 1990s, explored its impact on rural areas and tourist behaviour (Hall, 1996). In recent decades, wine tourism has gained momentum, leading to increased interest in the academic community to research this phenomenon (Pop & Coros, 2023) especially in highly developed countries with a long tradition of viticulture and wine tourism (Martínez-Falcó et al., 2024a), where wine holds significant importance as an export commodity. Gómez et al. (2019) identify seven fronts of research on wine tourism: territorial development, wine routes, behaviour of wine tourists, tasting and winery experience, theoretical models, wine events and festivals, and wine marketing and promotion. When it comes to territorial development, issues related to the potential of wine tourism for economic and regional development, and sustainability are especially investigated and analysed (Vrontis et al., 2014; Nepal et al., 2019; Nave & Finisterra do Paço, 2021; Fuentes-Fernández et al., 2022; Trigo & Silva, 2022). Kubát et al. (2023) took a step further in their study shifting the focus from mere vine and tourism to the wine destination and winescape concept.

Despite increased interest from researchers, specialists still highlight several knowledge gaps. Longitudinal studies on sustainability aspects and outcomes from involvement in wine tourism are lacking, as are research studies comparing sustainable wine tourism practices and principles across different regions, including between new and old world or emerging and renowned wine regions (Trigo & Silva, 2022). Another critical knowledge gap is the need for conceptual frameworks for understanding various aspects of sustainable wine tourism, such as community involvement, destination articulation, and successful business models (Alonso et al., 2020). There is a significant gap in specialised wine tourism courses and knowledge of the language associated with wine (Zurita, 2023).

Popular destinations for wine tourism include traditional wine regions such as France, Italy, Spain, and the United States, alongside New World wine regions, while developing wine regions are considered to be China, India, and Eastern Europe. There are also lesser-known sites with a long tradition of viticulture and winemaking that have yet to fully leverage their potential to become wine tourism destinations. One such region is West Herzegovina Canton (WHC) in Bosnia and Herzegovina (BH), a country geographically situated in Central Europe. Although tourism in WHC may generally be an essential economic and developmental activity, despite having relatively numerous attractive and diverse resources, good transport connectivity, and proximity to other appealing destinations, the tourism industry in WHC is still in its infancy, as cited in *The Tourism Development Strategy of West Herzegovina Canton for the period 2020-2027* (The Government of the West Herzegovina Canton for European Integration, 2019a, Strategy).

Interest in offbeat tourism destinations, particularly wine-producing rural areas, is on the rise due to their unique features such as vineyard landscapes, rich heritage, and culinary traditions (Andrade-Suarez & Caamano-Franco, 2020). In conducting a situational analysis of the current development of wine tourism in the West Herzegovina Canton, the following questions have been addressed: What are the main issues in developing sustainable wine tourism? What opportunities exist for its development? And what key factors are essential for its successful development? This paper aims to stimulate scientific dialogue on the development of wine tourism throughout BH and has practical applications. These practical implications offer valuable insights for policymakers, destination marketing professionals, and wine producers, assisting in the planning and implementation of activities to enhance wine and tourism experiences at various levels.

2. Literature review

2.1 Key factors for the sustainable development of wine tourism

The cultivation and processing of grapes into wine in large wineries play a significant socio-economic role in certain regions worldwide (Hojman & Hunter-Jones, 2012; Gómez-Carmona et al., 2023). The global wine market is projected to reach a valuation of US\$ 2,971.13 billion by 2033, with wine producers expecting a compound annual growth rate of 5.7% through 2023 and beyond. The current market valuation is US\$ 1,709.27 billion in 2023. According to the latest findings from Future Market Insights, global wine tourism revenue is expected to reach US\$ 85,145.2 million by the end of 2023. In the long term, the wine tourism market is estimated to reach approximately US\$ 292,538.4 million by 2033. These data not only highlight the current economic strength of the wine tourism market but also suggest a trend toward rapid growth, offering entry opportunities for even lesser-known destinations. Several key factors are identified for the development of a wine tourism destination. These include: the potential to increase the number of independent visitors to wineries; the availability of wine festivals and events; and the effectiveness of regional tourism promotion (Getz & Brown, 2006; Tomljenović & Getz, 2009); stronger networking among wineries and other tourism stakeholders to create and promote organised tours (Howley & Van Westering, 2008); and political and institutional factors, regional infrastructure, and wine tourism facilities (Alebaki et al., 2015).

Other important factors include: enhanced cooperation and networking among organisations and stakeholders connected by economic and social relationships and transactions, as well as targeted training for wine producers to improve their understanding of the tourism and hospitality sectors (Del Chiappa et al., 2019); friendly service, staff knowledge, clear signage, educational programmes, building interior and ambience, and translation services (Woldarsky & Geny-Denis, 2019); the protection of traditional vine varieties (Kourkouridis, 2020); and innovation in services, marketing, and partnerships (László, 2023).

The establishment of a successful wine tourism industry can be achieved through targeted marketing campaigns, investments in infrastructure and facilities, and the implementation of sustainable practices that preserve and enhance natural and cultural resources (Lubawa & Osabuohien, 2024). While wine tourism development is primarily led by wine producers, it is often small and medium enterprises that are most involved (Petelca et al., 2022). However, Chiappa et al. (2019) suggest that winemakers primarily view tourism as an opportunity to promote and sell their wines, raising questions about the extent of their role as drivers of tourism development. Meler and Horvat (2018) propose centralising sales and marketing activities at the wine producer level, which would enable a practical and comprehensive division of marketing activities, encompassing both strategic and operational marketing.

Nepal et al. (2019) stress the importance of reassessing tourism's impacts and promoting policies to align it with the UN's Sustainable Development Goals (SDG 13), which focuses on managing tourism sustainably to mitigate its impact on climate change. Sustainable wine tourism encompasses the principles of environmental, economic, and social sustainability, as well as education, awareness, and responsible consumption (UNWTO, 2022). László (2023) concludes, based on nearly two decades of global research, that it is increasingly important to examine sectoral and local specificities of sustainable development challenges. Tourism sustainability depends on community leaders and experts maximising benefits while minimizing costs. Local residents prioritise sustainable landscapes and regenerative agricultural practices due to their profound connection to the land (Pearson et al., 2024).

Wine production and wineries are embracing sustainability (Flores, 2018), utilising organic methods and implementing eco-friendly techniques in both viticulture and production. Sustainability has arrived in the wine industry and wine tourism, and will undoubtedly play a significant role in the future. To plan for the sustainable development of a wine destination, it is necessary to understand local tourism issues and identify key sustainability needs based on the destination's potential (Szolnoki & Ridoff, 2021).

Consumers increasingly prioritise sustainability in the wine industry, providing wineries with opportunities to adopt eco-friendly practices and attract a niche market. Additionally, rising interest in wine leads to more participants in wine tourism, seeking unique and authentic experiences. These experiences include wine tours, guided visits to vineyards, and wine-tasting sessions. Participants also engage in wine festivals and events, wine education workshops, and exploring wine trails and routes. These activities often offer opportunities to purchase wine directly from the source or nearby (UNWTO, 2023). Additionally, active leisure activities such as grape harvesting and wine production are becoming increasingly popular. This trend not only generates revenue for regional economies, but it also promotes a deeper recognition of wine (Malfeito-Ferreira, 2023).

2.2 Research setting: wine tourism in West Herzegovina Canton

Bosnia and Herzegovina is administratively divided into two entities: The Federation of Bosnia and Herzegovina (FBH) and the Republika Srpska, and also includes the Brčko District. The FBH consists of ten cantons, one of which is WHC, located in the southwest of BH, representing 2.66% of the country's territory (HERAG, 2018). This relatively small area has an extremely favourable climate for viticulture. Its southernmost parts have a Mediterranean climate with dry and hot summers, while the northernmost regions have a warm and humid climate, with snow cover persisting longer at higher altitudes. Geographically, it comprises two distinct morphological regions: the northern portion, part of the Bosnian-Herzegovinian Dinaric karst, and the southern expanse, which forms part of Herzegovina's lowland region. The terrain is characterised by rich relief and geomorphological forms, as well as hydrographic elements.

Tourism activity in this area remains relatively low, despite a rich and diversified resource and attraction base, good transportation connectivity, and proximity to other attractive destinations (Strategy, 2019a). The total number of accommodation units is comparatively small, totalling 171 in four hotels, five motels, two guesthouses, and one rural tourism facility. These facilities are primarily tailored to meet the needs of business and transit demand, rather than leisure tourism (Strategy, 2019a). In the WHC, in addition to summer and winter tourism, agrotourism (vineyards, orchards, vegetable farming, honey production), rural, adventure, fishing, cycling, cultural, religious, and speleological tourism can be developed. The proximity to tourist markets such as Međugorje, Mostar, Split, Zadar, and Dubrovnik enables the development of both transit and excursion tourism (HERAG, 2018).

The record year for tourist arrivals and nights stayed was 2019, with a total of 9,740 domestic and foreign tourists and 14,513 overnight stays. In 2020, due to the COVID-19 pandemic, arrivals decreased by approximately 75%, and nights stayed dropped by 80%. However, by 2022, tourist arrivals had reached 84%, and nights stayed had reached 89% of the values recorded in 2019. The majority of guests, almost 50%, are typically visitors from Croatia (Bulletin No. 4.13 of the Federal Institute of Statistics, 2023). When evaluating WHC's tourism competitiveness, the highest ratings were given for food quality, use of local ingredients, traditional food preparation methods, diversity in food and beverage options, and the authenticity and accessibility of dining establishments. These findings are unsurprising, considering that WHC, like Bosnia and Herzegovina as a whole, is located in an exceptionally favourable climate with clean air, water, and soil, providing the essential conditions for the advancement of ecological production.

The total agricultural area in WHC amounts to 53,165 hectares, of which less than 1,000 hectares (1.73%) are dedicated to vineyards. Projections for 2030 anticipate an increase in the use of agricultural land for viticulture to 4.32%, as cited in *Strategy for Rural Development of West Herzegovina Canton for the Period 2020-2030* (The Government of the West Herzegovina Canton for European Integration, 2019b). The grapevine is the most important and one of the most widely cultivated crops in Herzegovina (Rotim & Crnjac, 2023). The vineyards in the Grude and Ljubuški regions, where the indigenous Herzegovinian varieties Blatina and Žilavka are cultivated, have the highest tourism appeal.

There are no archaeological findings pinpointing the exact origins of grape cultivation in the broader Herzegovina region. However, regarding winemaking and viticulture, WHC boasts a rich tradition spanning over 2,200 years, placing it among the regions with a profound historical heritage in grape cultivation and winemaking. Despite the devastation wrought by World War II, viticulture in Herzegovina underwent a remarkable revival in the post-war period. This resurgence was driven by the adoption of innovative grapevine cultivation techniques, the implementation of modern viticulture practices, and the establishment of state-of-the-art Hepok wineries across Herzegovinian cities, as outlined by Sivrić (2009).

Regarding the legislative regulation of the winemaking sector in Bosnia and Herzegovina, the organisation of the wine market, including regulations on grape and wine production, labelling, and market supervision, is governed by the Law on the Organisation of the Wine Market (Official Gazette of BH, No. 63/23). The law also mandates the establishment of a vineyard registry for all grape producers selling their produce, and authorised laboratories conducting wine analyses must meet ISO/IEC 17025 standards. This new regulation is expected to significantly boost the competitiveness of domestic grape and wine producers, facilitating their entry into European and global markets.

Notable wineries in the region include Hepok Vinarija Ljubuški, established in 1882, and the Wine Cellar Buntić, established in 1921. In Herzegovina's diverse vineyards, standout local cultivars include Žilavka and Blatina. Additionally, complementary varieties such as Bena, Krkošija, and Dobrogostina with Žilavka, and Trnjak with Blatina, as well as internationally renowned types like Vranac, Merlot, and Alicante Bouschet, are grown. Post-war vineyards in Herzegovina also feature respected cultivars like Syrah, Chardonnay, Cabernet Sauvignon, Sauvignon Blanc, Muscat Ottonel, Graševina, and many more (Rotim, Gašpar, Perić, 2017).

Today, for many small family wineries, selling wine to visitors constitutes the largest part of their income. These wineries play a pivotal role in shaping wine tourism in WHC, particularly those involved in the prominent wine tourism initiative across Bosnia and Herzegovina – the Wine Roads of Herzegovina. Launched in 2007 (Jahić, 2016) under the theme 'With Wine Through Time', this initiative initially connected 22 vineyards and wine cellars from the municipalities of Ljubuški in WHC, Čitluk, Mostar, Čapljina, and Stolac in Herzegovina-Neretva Canton, as well as Trebinje in Republika Srpska. As the project progressed, it expanded to include nine additional vineyards and wine cellars, totalling

31 participating establishments. Wine routes are among the most attractive offerings in wine tourism, drawing tourists seeking tranquillity, social connection, and immersion in nature. They align well with green, sustainable, and religious tourism (Bellia et al., 2021). Wine routes play a significant role in enhancing the competitiveness of a region and contribute to the image of a high-quality tourist destination (Martínez-Falcó et al., 2024a).

Wine tourism in the WHC extends beyond vineyard tours and wine education, encompassing wine cellars and onsite restaurants nestled within the vineyards themselves. Alongside wineries, the region hosts a variety of wine-related events, including festivals such as the Taste of Ljubuški Wines, Wine Workshop – Vineyards Nuić, and Blaž Enology. Gastronomic gatherings like Raštikijada in Grude and Street Food in Široki Brijeg also celebrate local wines and cuisine. These events typically serve as enogastronomic gatherings, showcasing indigenous products from local producers. Additionally, it is important to highlight the establishment of the 'Herzegovina Tourism Cluster', which brings together stakeholders from three Herzegovinian counties to build strategic alliances, with the goal of creating a unique brand for Herzegovina as a tourist destination. This initiative focuses primarily on gastronomy, viticulture, and the renowned Herzegovinian wines.

3. Methodology

This study aims to provide a situational analysis of the current development of wine tourism in WHC focusing on key factors for developing sustainable wine tourism as perceived by winery owners and/or managers. To meet the paper's objective, empirical research was conducted based on official statistics, policy documents, professional and scientific literature, as well as other secondary data sources. The research was carried out using the e-Delphi survey method, employing a Google Form distributed to panellists via email. E-Delphi research typically consists of two rounds of inquiry (Visković, 2016). The challenges and opportunities were investigated, and based on all the research, the key factors for development of sustainable wine tourism in WHC were identified.

The panellists included in the sample are business owners registered for tourist activities, primarily in wine tourism, presidents of organisations whose activities are related to tourism, as well as authorities involved in decision-making regarding tourism development in the WHC. In the first round of the study, 20 participants took part, and in the second round 14 participants were involved. The literature does not provide a consensus on the required number of panellists in Delphi studies (Visković, 2016). According to Okoli and Pawlowski (2004), the literature recommends 10–18 experts on a Delphi panel, and for single surveys, attrition (participant drop-out) is not considered a significant issue.

The research findings are expressed as percentages and weighted arithmetic means to demonstrate more accurate values of certain variables. The output results were analysed and explained using the PEST matrix (political, economic, social, technological factors) which closely focuses on the issues and development opportunities of wine tourism in WHC. A PEST analysis is usually part of a larger approach to business analysis and is used alongside a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis to diagnose the current situation and project the future. It is a tool for effective planning and making strategic business decisions, with the purpose of maximising opportunities for profit and competitive advantage.

4. Findings

Sociodemographic profile of respondents: Gender: M=60%, F=40%; Age: 31-40 years (40%), 41-50 years (35%), 21-30 years (20%); Education level: 50% with a Master's degree. The respondents primarily include 37% hospitality professionals employed as directors/owners of hospitality

establishments and wineries. Two-thirds of the respondents have been involved in promotional activities in tourism, tourist events, or hospitality at some point in their lives. According to the Delphi method, the sociodemographic profile of the panellists is not the focus of analysis.

4.1 The current state of wine tourism development in WHC

The current state of tourism development in WHC was rated as mediocre by 55% of respondents, while opinions on wine tourism development were slightly more positive. Forty-five percent considered it mediocre, while 30% rated it as very good. Almost 80% of respondents believe that wine cellars in WHC are equipped with modern equipment for processing, refining, and aging wine. The most significant sources of funding for wine tourism are identified as private individuals' funds and resources from European funds, while funds from tourism clusters are considered the least important.

Fifty percent of those surveyed believe that the development of winemaking is not adequately encouraged and managed for the needs of wine tourism development at the national level. Respondents were asked to express their views on the role of the state in the development of wine tourism in WHC. The majority believe that the state could play a greater and more influential role in the development of wine tourism. In the continuation of the survey, respondents were asked to indicate their level of agreement with statements following the sentence, 'Development of wine tourism in the WHC...'. The statements, with weighted arithmetic mean values from the first round of surveying, are presented in Table 1.

Table 1. General opinions of the respondents about the development of wine tourism in WHC

Statement: Development of wine tourism in the West Herzegovina Canton...	W.M.
... would enable the creation of an image of WHC as a wine tourism destination, attracting new target groups.	4.17
... would be beneficial for elevating WHC as a tourist destination.	4.17
... would foster a business climate and development of other specialised forms of tourism.	4.11
... is feasible because conditions for its development exist.	4.00
... is problematic because it requires significant financial investment.	3.45
... is slow and complicated for interested entrepreneurs due to excessive administrative hurdles.	3.28
... is not profitable because tourist demand does not show potential for its development.	2.67

Source: Author's calculation, 2024.

According to responses in the second round, 43% of participants agreed that 'Development of wine tourism in WHC would enable the creation of an image of WHC as a wine tourism destination, attracting new target groups.' Following closely, 21% of respondents indicated that 'It is feasible because conditions for its development exist.' Additionally, respondents were asked a general question about the contribution of wine routes to the tourist and economic development of WHC. The results show that the significant contribution of wine routes to the tourism and economic development of WHC is primarily evident in the development of new content and products (cultural, tourism, crafts, small businesses), accounting for 50% of responses. Following closely, the statement 'The development of year-round special interest tourism, leading to economic growth and development', constituted 36% of the findings.

4.2 Issues and Opportunities for the development of wine tourism in the West Herzegovina Canton

Several statements regarding the positive and negative impacts of wine tourism on social changes were also provided in the survey. The following are statements with values of weighted arithmetic mean from the first round of surveying (Table 2). According to responses in the second round, the development of wine tourism would primarily influence 'The creation of a shared cultural space and cultural cooperation', at 43%. 'Increase employment opportunities' is in the second place with 29% of responses.

Table 2. Opinions of respondents on the positive and negative impacts of wine tourism on social changes

Statements	W.M.
Encourages education and human resource development.	4.00
Increase employment opportunities.	3.89
Reducing emigration and facilitating demographic recovery.	3.89
Creation of a shared cultural space and cultural cooperation.	3.89
Establishment of personal friendships.	3.89
Development is aligned with cultural and traditional values.	3.74
Everyone equally participates in shaping their future.	3.53

Source: Author’s calculation, 2024.

Based on all responses and individual opinions presented, the most significant problems and opportunities for the development of wine tourism in WHC have been highlighted. In the second round, respondents were required to select one statement they considered accurate, and the results of their responses are shown in Table 3.

Table 3. Wine Tourism in WHC: Issues and Opportunities

Issues	(%)	Opportunities	(%)
Low interest among public policy stakeholders for its development.	50	The quality of the wine	43
Insufficient investment in the development of wine tourism.	21	Wine routes represent an opportunity for popularizing WHC as a wine tourism destination	29
Lack of marketing for the development of wine tourism and its placement in the tourist market	14	Viniculture is developed	21
Poor communication among potential stakeholders.	8	There is a sufficient number of wineries/wine cellars	7
Inadequate trained personnel for organising and developing wine tourism	7		

Source: Author’s calculation, 2024.

While the most significant issue hindering the full development of wine tourism in the first round was insufficient investment in wine tourism development (90%), in the second round, it is the low interest of public policy stakeholders in its development (50%). A minority of respondents (7%) consider the lack of educated personnel for organising and implementing wine tourism as the most important problem for future wine tourism development.

5. Discussion

5.1 Analysis of output results

According to responses, the statement 'Development of wine tourism in WHC would enable the creation of an image of WHC as a wine tourism destination, attracting new target groups' received the highest score of 43% (Table 1). Highlighting the differences between two similar destinations is an important factor in creating an image, as tourists develop perceptions of a destination based on the image, which must be distinct and, of course, more attractive than the other destination, when choosing where to visit. Sekhniashvili and Bujdosó (2023) argue that the main factor influencing decision-making is the image of the destination, and wine tourism contributes to creating an image of a quality tourist destination (Martínez-Falcó et al., 2024a). Additionally, besides attracting new target groups through the creation of a wine destination image, a positive image in tourism marketing is one of the crucial factors influencing consumer loyalty, enabling the long-term sustainability of wine tourism.

Respondents were also asked to identify the impacts of wine tourism on social changes. The ongoing debate over tourism's social and cultural impacts is a recurring concern for tourism development and sustainability. According to 43% of responses, the development of wine tourism would primarily influence 'The creation of a shared cultural space and cultural cooperation' (Table 2). The area of cultural sharing plays an important role in people's economic and cultural exchange and interpersonal interaction (Liu, 2021), and 'cooperation is at the heart of the human condition and socialization' (Sempere, 2018: 167)

Establishing shared cultural-tourism spaces stands as a pivotal objective in crafting cultural routes, notably wine routes, particularly fostering cross-border collaboration (Karamehmedović, 2017). This endeavour proves especially beneficial for the advancement of lesser-known destinations such as WHC. Respondents were asked a general question about the contribution of wine routes to the tourist and economic development of WHC. Wine routes are a global trend today (Terziyska, 2018), with examples such as the 34 wine routes in the Iberian country (Martínez-Falcó et al., 2024a), and numerous wine routes in Mexico (Fernandez, 2023). Developing wine routes fosters alliances among wineries, hotels, restaurants, tourism promoters, and local government to promote the region. This sustainable approach drives economic growth, enhances wine production, and improves living conditions.

5.2 Analysis explanation of qualitative and quantitative data using the PEST matrix

Being part of both the wine industry and the tourism sector, wine tourism is affected by various problems and challenges, including political, economic, and socio-cultural factors (Fountain et al., 2021). Considering the general opportunities and challenges for tourism development, as well as economic growth in WHC (HERAG, 2018), some political and legal factors hindering the development of wine tourism include:

- The political climate, along with instability at local, federal, and state government levels.
- At the national level, there is no legislative framework for the development of wine tourism (even though tourism is in the process of ratification).
- The Vineyard and Wine Register is not yet operational.
- There is a lack of encouragement or management of viticulture and viniculture development at all levels of governance.
- Absence of tourist boards or destination management organisations dedicated to spearheading the development and management of wine tourism.

However, Strategy (2019a) provides a solid legislative framework for the development of wine tourism. The current state of tourism development in WHC was rated as mediocre by 55% of respondents, while opinions on wine tourism development were slightly more positive, with 45% considering it mediocre and 30% rating it very good. Aside from general economic instability and uncertainty, the most significant economic challenges hindering the development of wine tourism include:

- Insufficient investment in wine tourism development.
- High investment costs in modern equipment for processing, refining, and wine care, which have further increased amid inflationary pressure.
- The absence of financial assistance from the state/federation/canton for wine tourism development.
- Fiscal reliefs are needed to facilitate easier investment and operation in wine tourism.

The wine industry and wine tourism are not synonymous, and there are experienced winemakers who do not always have a defined position on investment in wine tourism (Robinson & McGregor, 2019). The success of wine tourism is driven by both entrepreneurial and political actions (Del Chiappa et al., 2019; Martínez-Falcó et al., 2024b). Additionally, enhancing collaboration among relevant local stakeholders is of paramount importance (Alonso et al., 2015), as their cooperation is crucial for achieving sustainable development of wine tourism in a specific region. Therefore, in addition to the aforementioned political, legal, and economic factors, it is necessary to consider the social factors that hinder the development of wine tourism:

- Low interest of public policy stakeholders in its development.
- The local community and wineries have not fully realised the potential of wine tourism as an activity that leads to overall prosperity.
- Insufficient action from associations involved in wine tourism, as well as in tourism in general.
- Lack of marketing for the development of wine tourism and its placement in the tourist market.
- Poor communication among potential stakeholders.
- Inadequate education and training for organising and developing wine tourism.
- Collaboration between stakeholders and the local community is neither stable nor continuous.
- The state addresses problems *ad hoc* rather than systematically.
- The worsening demographic picture of WHC demands urgent action.

Pop and Coros (2023) highlighted the lack of adequate communication between various levels of public authorities, leading to underdeveloped tourism in rural areas despite initiatives dating back two decades. Del Chiappa et al. (2019) emphasized the importance of effective promotion, stakeholder networking, and targeted training for wine producers in wine tourism development. Additionally, wine tourism is recognised as a mechanism for territorial development. Therefore, the suggestion for policymakers and marketing professionals is to implement branding strategies that foster collaboration among local stakeholders in the wine industry, tourism, and related sectors (Martínez-Falcó et al., 2024a).

Significant advantages for the development of wine tourism can certainly be found in the climate and natural conditions for viticulture, as well as in the experience and long tradition of grape and wine production in WHC. In addition to the mentioned advantages for development, enhancement, and promotion of wine tourism can also be found in technical and technological factors such as:

- Rapid development of information and communication technologies, facilitating global communication and visibility for lesser-known destinations.
- Improved transportation connectivity, such as the construction of the Dalmatina highway in Croatia.
- Technological advancements in production, storage, and quality control of wine, leading to increased production and enhanced quality.

- Ease of conversion of uncultivated areas into vineyards.
- Improved transportation logistics for wine distribution and supply chain management.

Visitors often explore other attractions and engage in non-wine-related tourist activities during their visits to wineries (Correia et al., 2004; Alebaki et al., 2015). The success of oenotourism hinges on wine producers' approach to tourism, their provision of services, and the overall visitor experience they offer (Getz, 2000; Howley & Van Westering, 2008; Del Chiappa et al., 2019). However, effective oenotourism development requires more than just the efforts of wine producers alone, as highlighted by researchers and practitioners (Brás et al., 2010).

In conducting a situational analysis of the current development of wine tourism in the WHC, the following questions have been addressed: What are the main issues in developing sustainable wine tourism? What opportunities exist for its development? And what key factors are essential for its successful development? Considering these factors, the key elements for fostering sustainable development in wine tourism within WHC are:

- Increasing interest of public policy stakeholders and investments in wine tourism development.
- Implementing comprehensive marketing strategies for the development of wine tourism and its placement in the tourist market.
- Encouraging cooperation among all stakeholders, improving communication, and fostering synergy.
- Educating winemakers on wine production and other stakeholders involved in wine tourism.
- Enhancing ecological wine production and wine quality.
- Expanding capacity and modernizing existing wineries.
- Promoting wine tourism and improving the region's image.
- Developing other specialised forms of tourism.
- Advocating for supportive public policies and removing administrative obstacles.
- Managing the sustainable development of wine tourism.

The main issues are: low interest among public policy stakeholders and insufficient investment in the development of wine tourism; lack of marketing for the development of wine tourism and its placement in the tourist market. The main opportunities are the quality of the wine and the well-developed viticulture and wine routes, which present an opportunity to popularise WHC as a wine tourism destination.

6. Contributions, research limitations, and recommendations for future research

The contribution of this work is reflected in two elements. Firstly, in the theoretical section, this paper provides the first comprehensive explanation of the development of wine tourism in the WHC. This aspect also served as a focal point for the empirical research, given the evident scarcity of scientific and professional literature on the subject of wine tourism in BH. The second contribution of this work lies in the results of the empirical research. This research not only enhances scientific theory but also holds practical implications valuable not only to winemakers and investors, but also to public policymakers, particularly in destination marketing management within WHC.

In Bosnia and Herzegovina, as in many other countries, there should be a so-called 'wine registry'. According to the Wine Law (Official Gazette of the FBH, No. 55/12) and the Regulation on the Content and Method of Maintaining the Vineyard and Wine Register (Official Gazette of the FBH, Nos. 102/13 and 102/15), registration in the Register is carried out based on information provided by competent municipal authorities in the counties. The designated register falls under the jurisdiction of the Federal

Ministry of Agriculture, Water Management, and Forestry, responsible for maintaining records of wine producers with protected geographical origin.

The first research limitation was the absence of this Registry because the competent municipal authorities of WHC never provided the necessary data. As a result, crucial details such as the exact number of hectares of vineyards, cultivated grape varieties, types of produced wine, and the specific wineries involved remain unknown in WHC. It is noteworthy that, in response to inquiries regarding data from the Register, the relevant Ministry has stated that, as of 2024, the software for managing the Register has not been implemented, despite regulatory provisions. Nevertheless, activities towards its establishment are currently in progress. The authors requested the necessary data from each municipality. Unfortunately, responses were never received. This information should be considered in future research endeavours. The second significant issue is the absence of operational tourist boards in three out of four municipalities in WHC, resulting in a lack of representation from these municipalities in the e-Delphi survey. Their participation would be important as tourist boards play a pivotal role in the planning, decision-making, and effective management of tourism development in the destination.

The third challenge arose during the empirical research because potential participants refused to participate in the survey. The relatively low response rate to the census questionnaire is another limitation of this work, despite repeated attempts to achieve a higher response rate. Certain respondents participated in the first round but opted not to engage in the second round, despite agreeing to participate in both rounds at the outset of the study. Nevertheless, ultimately, with the theoretical foundation and the conducted research, the set objective was successfully achieved, and the work stands as a relevant source for further investigations.

Future research recommendations include verifying factors listed in the study's limitations and examining the structure of wine tourism at the time, identifying weaknesses, strengths, opportunities, and threats. New empirical studies can uncover additional factors crucial for wine tourism development in the WHC and BH. Variables from tables, PEST analysis, and key determinants for sustainable wine tourism could be explored further. The development of wine tourism in this county will, over time, open up many topics for researchers, which may or may not build upon this study.

7. Conclusion

According to scientific and professional literature, numerous factors are important for the sustainable development of wine tourism. Some authors emphasize marketing activities, while others highlight the significance of collaboration among organisations and stakeholders. Additionally, institutional and political factors are regarded as pivotal by certain authors, while others underline the importance of a comprehensive destination offering as essential for sustainable wine tourism development. Perspectives on wine tourism development vary depending on the destination discussed. Challenges and opportunities differ significantly between destinations in the early stages of tourism development compared to well-established tourist destinations or those already renowned for wine tourism. Wine producers in developing regions can derive substantial benefits from wine tourism and gain valuable insights from the experiences of other wine regions worldwide.

The West Herzegovina Canton is not yet established as a tourist destination, lacking sufficient accommodation and tourist offerings. However, its accessibility, natural and cultural attractions, hospitable population, and long-standing tradition of viticulture and quality wine production present significant assets for developing a successful tourist destination. The area features wineries and cellars, some of which are renowned both locally and internationally, alongside popular wines such as Blatina and Žilavka, making it particularly appealing to wine enthusiasts.

The aim of this study was to analyse the current state of wine tourism development in WHC, identify issues and opportunities, and focus on key factors for sustainable wine tourism development. Low interest from public policymakers emerged as a major obstacle, while the enhancement of wine quality was identified as a key opportunity. Drawing on available literature, empirical research, and utilising the PEST matrix, key factors for sustainable wine tourism development in WHC were identified. These include ecological viticulture, the modernisation of wineries, improvement of wine quality, stakeholder education, holistic marketing approaches, fostering investment, influencing policy, effective development management, and enhancing communication and synergy among stakeholders.

To leverage its strengths for the future growth of wine tourism, including the favourable climate for viticulture and WHC's long-standing tradition in the sector, those responsible for tourism and economic development in WHC should prioritise implementing and advancing activities aligned with these key factors for sustainable wine tourism development. Bosnia and Herzegovina, including WHC, face numerous challenges in tourism development but have the potential to turn these challenges into opportunities. By learning from others and balancing sustainable development with the needs of the local population on the one hand, and economic benefits and carrying capacity on the other, WHC can achieve meaningful progress. Every decision regarding tourism development, as well as other forms of regional development, should align with this approach. Sustainability lies at the heart of wine tourism development, with its principles inherently aligned with those of the circular economy.

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Ključni faktori za razvoj održivog vinskog turizma u Zapadnohercegovačkom kantonu

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Sažetak: Istraživanje ima za cilj pružiti situacijsku analizu trenutnog razvoja vinskog turizma u Zapadnohercegovačkom kantonu, posebno ističući ključne faktore za razvoj održivog vinskog turizma prema mišljenju vlasnika i/ili menadžera vinara. Za istraživanje teme korišteni su znanstveni i stručni članci, online izvori te empirijsko istraživanje primjenom e-Delphi tehnike. Osim kvantitativne analize podataka, rezultati su analizirani i objašnjeni pomoću PEST matrice. Nizak interes dionika javnih politika za razvoj vinskog turizma prepoznat je kao najproblematičnije pitanje, dok je kvaliteta vina prepoznata kao najvažnija prilika. Uzimajući u obzir sva pitanja i prilike, te s obzirom na širi kontekst razvoja Zapadnohercegovačkog kantona, ključni faktori za razvoj održivog vinskog turizma uključuju: povećanje interesa dionika javnih politika i ulaganja u razvoj vinskog turizma, implementaciju sveobuhvatnih marketinških strategija za promociju vinskog turizma i njegov plasman na turističko tržište, poticanje suradnje među svim dionicima, poboljšanje komunikacije i stvaranje sinergije, obrazovanje vinara i drugih dionika koji su izravno uključeni u vinski turizam, poboljšanje ekološke proizvodnje vina i kvalitete vina, proširenje kapaciteta i modernizacija postojećih vinarija, promocija vinskog turizma i poboljšanje imidža regije, razvoj drugih specijaliziranih oblika turizma, zalaganje za potporne javne politike i uklanjanje administrativnih prepreka, te upravljanje održivim razvojem vinskog turizma. Ograničenja istraživanja uključivala su nepostojanje registra vinograda i vina, nedostatak operativnih turističkih zajednica u tri od četiri općine u Zapadnohercegovačkom kantonu te problemi s angažmanom sudionika tijekom empirijskog istraživanja. Preporuke za buduća istraživanja uključuju provjeru faktora navedenih u ograničenjima studije i ispitivanje strukture vinskog turizma u to vrijeme, identificiranje slabosti, snaga, prilika i prijetnji. Nova empirijska istraživanja mogla bi otkriti dodatne faktore ključne za razvoj vinskog turizma u Zapadnohercegovačkom kantonu i Bosni i Hercegovini.

Ključne riječi: razvoj vinskog turizma, održivi razvoj, Zapadnohercegovački kanton

JEL klasifikacija: Z32