

Abstract: The Mór Wine Region (MWR) is one of the smallest ones in Hungary. Its area decreased continuously to only 724 hectares till 2022. Nevertheless, a spatial concentration of farms can be observed, like it has happened in other wine-growing regions of Hungary. Our principal aim is to investigate the sale channels with special consideration of the personal, market and online forms in the light of sustainability. The pandemic time is over, the online sales are in vain, the personal relationship between the winemaker and the customer is currently enjoying a revival period. Within the framework of mixed methods approach, we surveyed 28 winegrowers and wineries to fill in our semi-structured questionnaires, as main method in this article. After evaluating the questionnaires, we can say that some young wineries, thanks to good marketing activities, are able to take advantage of modern community-based media and are able to reach semi-wealthy social groups that usually consume wine. Unfortunately, the majority of wineries are not able to do so. Furthermore, there is a lack of cooperation between suppliers that can initiate smaller wineries to process and store grapes, and at least appear on the domestic market.

Key words: local product, short supply chain, wine market, wine tourism, Mór Wine Region, sustainability, Hungary

Highlights

- The research series reflected to the force of locality.
 - The development problem is the small size and fragmentation of the wineries.
 - During the pandemic time the online sales increased, moreover, after COVID-19 on site sales revived.
 - The implementation of practices of short supply chain served the requirements of sustainability.
 - Fuelling wine-tourism, the cooperation of wineries and the innovations can give brilliant future.
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1. Introduction

The continuous change and transformation of the Hungarian grape growing and wine producing sector poses serious problems and issues for those working in the sector (Szepesi 2019). On the basis of the regime change and accession to European Union (EU) experiences in the last few decades, the Hungarian wine market underwent a significant and dynamic transformation (Kádár 1999; Lehota 2007). Due to the climatic characteristics of the Mór Wine Region (MWR), namely the cooler and windier than the average Hungarian climate, the old style quality grape varieties had to be replaced with modern, marketable varieties (Kovács et al. 2020; Donkó et al. 2016; van Leeuwen et al. 2019). Luckily for wine consumers and wine producers, a new generation of population has grown up that is looking for quality in wine, forcing producers to replace the poor quality bulk wines so typical to the socialist cooperative system (Botos and Moulton 2007). However, the market has become significantly saturated due to on the one hand the collapse of former international market, on the other hand the increased quality winemaking activity was born (Fanken et al. 2018; Marks 2011). The introduction of the product entails significant sums on the market, not to mention the additional costs such as entering long supply chains. In addition, recently, climate change also affects viticulture and winemaking, so the local climate and other biophysical conditions must be taken into account when planting varieties and applying technologies (Szolnoki et al. 2021). Due to the public health situation in recent years, sales chains have been completely revalued (Kismarjai 2015). In addition to sales in the traditional cellar combined with online sales have become increasingly important (Szolnoki et al. 2021).

Our aim is to investigate how personal sales will be realized after the pandemic is over, since online sales are in vain, due to the relatively new characteristics of the sector. We put special emphasis on the personal

relationship between the winemaker and the customer (Tomay and Tuboly 2023; Miftari et al. 2021). In order to get a more accurate picture about the current situation (Szolnoki and Totth 2019), updating the results of the earlier research (Kismarjai 2015) in which he examined the activity of the winemakers of the MWR.

The following part of this study is structured as follows. We started a critical literature review to depict the wide spectrum ranging from global through national to local spatial levels on wine industry. Afterwards we turn to materials and methods of research series and we articulate the core considerations of study area. In the main part, we provide empirical analysis mirroring the relevant dimensions of the development of MWR. In the final chapter conclusion and discussion are presented.

2. Literature review

On the basis of the international trends of the Hungarian wine market has turned towards individual wine regions more significantly in the last decades (Kunc and Tiffin 2011). The scale of grape and wine related research has multiplied, mainly due to the growing activity of traditional wine-producing countries (for instance Spain, Italy, France) and the emerging New World territories (for example, Australia, South Africa) (Cassi et al. 2011). This increased production has changed the focus of the researches into wine regions. The number of researches in connection with macro- a micro-economic processes has become significant since winemakers are exposed to the new market challenges, which can be research by the tools of marketing survey and/or questionnaires on consumer's habits. What is clear that, the inner wine business sector itself is divided into two large groups, wine growers and wine producers, which groups are especially separated in Hungary. Unfortunately, their relation is fairly restrained (Botos and Moulton 2007). The transfer of the knowledge base could help to remove this gap, in which the so called wine tourism research could play a major role (Güzal et al 2021; Szabó et al. 2021; Kunc and Tiffin 2011).

Several studies have been conducted on sectoral competitiveness and profitability, but they also lack a regional approach and a presentation of the differences in the wine regions (Harsányi 2007; Nagy-Kovács 2011). Unfortunately, regional-based researches are not common in the last decade except for the Mátraalja Wine Region, which has been examined from a modernization perspective (Magda and Gergely 2004) and the Eger Wine Region by sales type (Györe 2011). The conclusions of the research are that the recovery of the regions are the production and sale of premium products based on technological modernization. The fragmented size of the holdings in the sector and the small quantities produced, the authors would strengthen (Magda and Gergely 2004; Györe 2011; Csillag et al. 2019) the co-operation, which would have a task of maintaining quality and facilitating or carrying out sales. Unfortunately, this does not get enough support due to the bad past experiences of producers in Eger Wine Region (Györe 2011). In the same way, the lack of cooperation and the prominence of individual solutions of grape producers and wine makers are evident at the site of the previous research, in the Mór Wine Region (MWR) (Kismarjai 2015).

Of course, the general forces have significant influences on local conditions. The ageing Hungarian population and workforce problems also occur at the macro-social level, parallel with the international migration balance turns to minus signs (Gellénné-Lukács and Kincses 2020). However, the local sector-specific responses may provide sustainable solutions to challenges stem from different levels and spheres.

Due to the insufficient scope of the Hungarian literature, it is necessary to look at foreign results. Thinking on an Australian scale, the business ideas of small wineries of similar territory were surveyed using quantitative questionnaires and qualitative interviews. As a conclusion, it was found that about half of those surveyed had a specific vision. Out of the respondents, 40% of them limited their own ideas regarding the future, while 10% of them were not interested at all to the near future (Alonso and Northcote 2010). Alonso and Northcote have examined Western-Australian wineries, then compared them to the ones in the Canary Islands with harvesting less than 100 ton grapes/year per capita. The main topic of the article was the close relationship between wineries and local ("village") tourism, complemented by other, generally charitable, appearances. The survey concludes that wineries in both

locations are actively involved in the life of the local community, often as the largest employers (Alonso and Northcote 2008).

Nowadays, the key is to cooperate successfully to satisfy consumer needs as quickly and as perfectly as possible (Szakály 2017). Companies compete for the favours of customers (Gál et al. 2014; Chikán 2010; Csillag et al. 2019). Consumer needs (Panyor et al. 2014) and the factors influencing them must be taken into account in order to develop a successful marketing strategy (Hawkins, Best and Coney 2001). Hawkins et al. (1992) described that consumer behaviour is determined by the consumer lifestyle, the purchasing situation, and the product made for sale itself. The consumer lifestyle is determined by culture, values, demographics, social status, reference groups, consumer household, personality, motivations, memory, information evaluation, and learning process (Nagy and Gulyás 2014; Zsótér and Kaliczka 2014). Consumer habits, satisfaction, and loyalty have been examined in several studies (Vincze-Lendvai and Csanádi 2013; Zsótér and Balog 2015; Králiková et al. 2021).

The management of the company (in this case by company we mean the wineries) has to decide which consumer needs it intends to satisfy with the mission and the strategy of the winery. They need to gather as much information as possible about different sort of consumer needs. Customer retention is very important on which a great emphasis is placed. Long-term cooperation would be the main goal and relationship marketing helps with this. With e-marketing tools, electronic data management and market segmentation become more efficient (Obermayer et al. 2022). The social media practices can satisfy customer needs in a much more personalized way, as they can learn a lot about them from databases (Hampel 2018). This is dealt with by the customer relationship management, by CRM (Customer Relationship Management) systems (Hampel 2021).

The marketing mix contains elements with which we can gain and retain the favour of consumers. These elements are: Product, Price, Place of Sale and Promotion. The product policy includes product structure selection, product lifecycle management, and product presentation. The pricing policy deals with setting the price of the products offered and adapting to the rapidly changing environment. The state very rarely regulates the formation of prices with official prices for certain products (Nagy 2015).

Sales routes policy is the third element in the marketing mix. The way of a product travels from the manufacturer, to the producer, then to the supplier and finally to the consumer is called the traditional sales route or marketing channel. It is important to analyse and select the sales routes in order to shorten it for economic sustainability purpose (Török et al. 2022). During the analysis, it is necessary to assess the customer where, what, when, how, in what packaging, etc. The company must adapt to meet the needs of its customers with the least possible waiting time, good availability and product range. Extremely long sales routes need to be developed in line with this analysis (Chikán 2010).

If a company delivers its products to consumers through intermediaries, it presupposes a high degree of cooperation between the company and the intermediaries. This is called a distribution system. There are three types of distribution systems: corporate, managed and contractual. This includes franchising, too, in which the company transfers the right to use products and services that are already well established in the market (e.g., McDonald's, Subway, Duna House).

The fourth element of the marketing mix is sales promotion, which is part of the company's communications policy. It is part of the communications mix, besides advertising, personal selling, and public relations (PR). The task of marketing communication is to provide information and persuade consumers in the target market. A sales promotion is the use of methods that encourage the customer to make further purchases.

Because of its high costs, the use of personal selling is only economical, if the personal relationship or trust is very necessary due to the particularly high value or uniqueness of the product or service. The purpose of PR is to increase the image of the company and to create a favourable reputation of the company itself. It includes corporate press releases, media appearances by company executives, corporate social roles, and more. The innovation greatly influences the long-term survival of agricultural enterprises, too (Benkő-Kiss and Horváth 2010). Of course, there is a difference between the innovation

opportunities of small and large-scale agricultural enterprises (Horvath et al. 2011). In the case of food, food safety (Fabulya and Hampel 2017) and quality control should be paramount (Fabulya et al. 2015).

Sustainable development or sustainability, involved climate change, is more and more important question for agriculture, so for vineries as well. Wine producers should handle many challenges to survive in changeable circumstances from macro to micro levels. Sustainability, as a key point of our future is based on United Nations activity. The Report on Our Common Future (United Nation 1987) laid the foundations of sustainability. In short, sustainable development means that any activities of mankind should make that the needs of future generations must be taken into account. Although there are different opinions and criticism mainly on implementation but sustainability has become practically accepted all over the world (Simonyi 2016; Simonyi and Zsótér 2020).

In wine sector or wine industry, sustainability approach has started in scientific research about the XXIth century. Dynamic evolution of publications can be detectable from 2012. Of recent years, at about 300–400 scientific articles are published mainly in three periodicals: Sustainability, Journal of Cleaner Production and Agronomy, as a seminal bibliometric study shows (Montalvo-Falcón et al. 2023). Importance of sustainability is clearly confirmed by the sphere of researchers, too. Many results for implementation of sustainability in wine sector can be found on the web. "What does sustainable wine mean?" a question is discussed by Patricia Kemp (2023). She calls attention to responsibility and resources management. Sustainable, organic, natural and biodynamic wines are distinguished clearly. Although, all of them are better than wines that are available on the mass-market. But sustainable wines are minimizing environmental impact on all level (cradle-to-grave in LCA – life cycle analysis). If somebody wants to be a sustainable wine producer, he/she should put his attention not only to the vineyard which is in focus of organic, natural and biodynamic viticulturist, but also to cellar and to the bottling and distribution. Scientific research found that consumers are responsible for the environment so accepting new, environmental friendly packaging (Szolnoki et al. 2022). One of the solutions in packaging is keg wine technology. Its importance is underlined by scientific results. In general, packaging has the greatest environmental negative impact concerning all stages of the wine value chain according to (Pougnnet et al. 2022). The short supply chain, especially when wine directly is served from producer to consumer, is one of the best solutions from the point of view of sustainable development.

Climate change is crucial for agriculture, as wine industry. A national example, VAHAVA project by Hungarian Academy of Sciences stated that two general fields are to focus on the activity: mitigation and adaptation (VAHAVA 2006). Moreover, many international scientific results discuss them in wine sector concerning mitigation, mitigating strategy, and adaptation (Berbegal et al. 2019; Mozell and Thach 2014; Sacchelli et al. 2016). The Hungarian National Council of the Wine Communities (Hegyközségek Nemzeti Tanácsa 2022) was a participant in the global wine tourism online survey by Winetourism.com and Hochschule Geisenheim University in 2021 (Szolnoki et al. 2022). Although the results show that Hungary was not one of the best committed countries but it was a turning-point for Hungarian wineries. More and more vineries recognize that sustainable practices in wine tourism are essential for more than half of the visitors and it will become significantly important (Szabó et al. 2021; Tomay and Tuboly 2023). The National Council of the Wine Communities published a well-established document about sustainable wine industry (Hegyközségek Nemzeti Tanácsa 2022). In order to achieve its goals in line with the requirements of sustainability, the economic and regulatory support for winery is essential especially for small wine regions and wineries, for instance in MWR.

3. Material and method

Mixed methods research was conducted in which we combine quantitative and qualitative assumptions (Morgan 2014). The own questionnaire survey was the main quantitative method besides secondary data analyses came from administrative data bases. The in-depth interview serves the qualitative side of the study.

To survey the wineries of the Mór Wine Region (MWR), we conducted as a primary research. As a basic sample of survey, we considered all the wineries in the MWR reportedly engaged in wine production. For

this purpose, we used the database of the website of MWR and the administrative “winery list” compiled by the government office. As of the closing date of January 20, 2020, the government office database lists a total of 47 individuals (winemakers between 40 and 60 years old) and 16 wine companies (15 small businesses and 1 large company) engaged in winemaking and / or bottling. However, only twenty of them currently sell in the settlement Mór and in the surrounding municipalities. We focused on them in this study.

In the primary quantitative research we personally visited the winemakers and they filled in the paper-based, so-called PPI – “paper and pencil interview” – questionnaires. In doing so, we took advantage of the specific method tailored by wine market problems (Totth 2005), as the answers to the questions were usually open or semi-open. The respondents were able to answer or supplement the answers offered with their own words and thoughts. To a lesser extent, we also used closed questions, typically for specific statistics. (For instance, “How many employees do you work with?”). The questionnaires were anonymous, neither the names nor any other identifiers of the respondents were indicated, only the name of the settlement was recorded, so the wineries were coded accordingly (for example, the respondents from MWR were given the codes “mór1”, “mór2”, etc.).

We have supplemented the Internet-based data gathering during COVID-19 epoch on sales in which we examined the marketing activities of the wineries. In this, we examined their web appearance and activity on social platforms, supplemented by the consumer interactions given to them (Paunovic et al. 2022). We examined the changes in sales channels: how winemakers use the possibilities of internet trade, what emphasis they place on personal wine tastings and personal connections in the future. The recording of the data erected from the social media was closed on 19th February 2022.

Based on the results of administrative data analysis, the survey results and the Internet related research, we conducted a final field work in the second half of 2022. We clarify the problems emerged, and share the preliminary results of the research series with the local stakeholders. At the end of the qualitative in-depth interview, we asked the six respondents' opinions on the research findings.

4. Study area

The climate of Mór Wine Region (MWR) is moderately warm and dry, characterized by 1950–2000 of sunny hours and 600–650 mm rainfall per year. The annual mean temperature is 10°C, late spring frosts are rare. Altitude is between 180–250 meter and North-westerly winds can strengthen, usually out of the growing season. In spite of frequent rainfalls, the continuous winds protect the vineyards against the fungal diseases, ensuring the eligibility of this region to growing grapes. Soil types are various: limestone, dolomite, loess, brown forest soils, and also chernozem (fat earth) based soils can be found in the region. However, all types of arable lands are highly calcareous in the region (Kiss 1992).

The region is typically famous for its white wines, 94% of the grape-growing area is planted with white grapes. This proportion is outstanding, Mór has the 3rd greatest ratio in Hungary, where national average is 70%. Similar ratio of white grape is cultivated in Nagy-Somló Region. Tokaj Region was positioned at the first place the share of nearly 100%, however, no official data was available for red grapes in Tokaj (KSH 2020).

The optimal climatic and edaphic conditions of the growing region enable the cultivation of grapevine cultivars with higher demands, than the usual in the country. This allows an unusual wine selection at the region, which can be observed at the supplies (Török and Mercz 1997). The most commonly used traditional grape cultivar in this region is Ezerjő, which belongs to the *Hungaricum*s (Csizmady et al. 2021). Hungarian breed, as many of its names indicate. It spread from the Upper Danube, it received state certification in 1956. It is cultivated in the Mór wine region, in the Ászár-Neszmély wine region and in the Lowland wine region. The berries are medium sized, round, yellowish green. The vines are medium rounded with a small number of canes. Leaves medium sized, heart-shaped, medium-growing, early to fruiting, with fertile buds and prolific. It gives slightly fragrant, hard acidic, greenish-white, long white wine (Rakonczás 2014).

The measures of the European Union (EU) for the protection of origin are very decisive (Kis and Pesti 2015). As a result, the legal status of wine regions has changed. Based on the EU decree in this direction, Hungary has also changed the classification of wine regions. On that basis, from 2009, wine harvested in a determined wine-growing area with a maximum yield of 100 hl/ha and having an alcohol content of at least 9% volume and a minimum (tartaric) acidity content of 3.50 g/l can get the term “Wine of Protected Designation of Origin” (PDO)⁶.



Fig 1. The landscape of the Mór Wine Region (Hungary). Source: own photo

MWR is one of the smallest wine regions in Hungary (see Figure 1), and its area has been steadily declining for the past decade. In 2011, according to the National Council of Vine-Growing Communities, MWR still had about 724 hectares of vineyards, which fell to 479 hectares by 2021 during ten years. This represents a reduction of 245 ha. The wine-growing capacity of the wine region has fallen by 34% in ten years. This decline was significantly greater than the national average. Similarly, the number of farms registered in the wine region has changed significantly. Consistent with the national process, a regional concentration can be observed here as well. Out of the 2445 plants reported in 2000, only 962 remained by 2021, which is a decrease of 60% in Hungary. As a result, the average wine-growing area per holding increased from 0.3272 hectares in 2000 to 0.7526 hectares in 2021. This, of course, means all vineyards, not just those involved in wine production. According to the data of the present survey, the average size of the plantation per capita under our sample is 7.34 hectares.

The area of the MWR covers one town and five villages, which are located at the foot of the Vértes Mountain, in the Ditch of Mór and in the Basin of Zámoly. The largest settlement in the area is the naming town, Mór (according to the publication of the Central Statistical Office entitled “Hungary's local register, 2019”, the number of its inhabitants is 13,885 natural person), which dominates the region due to its

⁶ The officially-administratively called Mór PDO (MPDO) relates to the spatial origin of wine erected from Mór Wine Region (MWR) in all over the World. From strictly territorial sense MPDO is equal to MWR, so we utilize the term, MWR in this paper, as the most common in spatial literature.

administrative role. The decisive part of the vineyards of the former mining settlement Pustavám (2501 people) is a thing of the past, there is no tax warehouse in the settlement, there are members of the vine-growing community producing only for their own purposes. The same characteristic goes for Söréd (586 people). In the case of Zámoly (2205 inhabitants), the disadvantage is the Gránási Hill, a production site that is very far from the village and difficult to access. The grapes of Csókakő (1447 people) and Csákberény (1142 inhabitants) are located on a low hill at the foot of the Mountain Vértes, which due to their advantageous position – a cohesive area, good accessibility, historical and cultural attractions – can develop further in the near future.

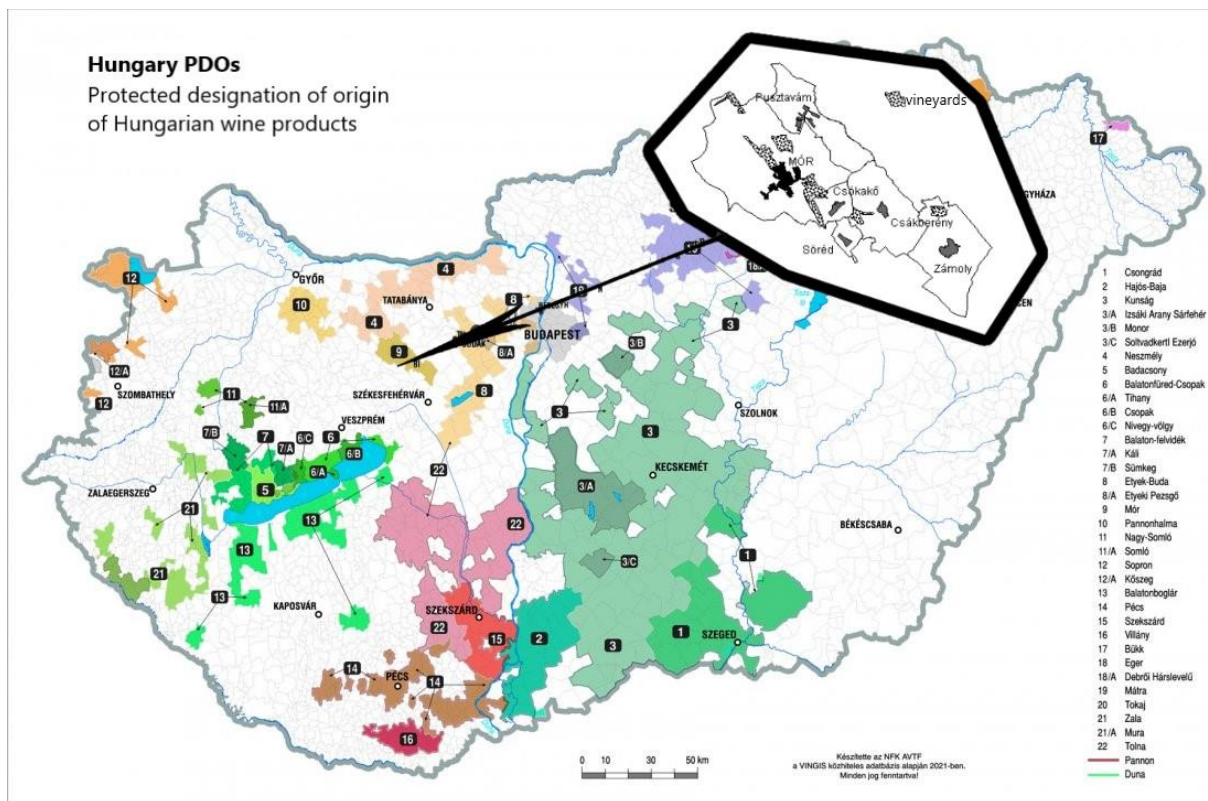


Fig 2. Location of the Mór Wine Region (MWR) and other wine regions in Hungary. Source: National Land Center

5. Results

The responses of questionnaires revealed that the majority of wineries in the wine region operate as sole proprietorships or family businesses (see Table 1), and that there are far fewer limited liability companies (LLC), limited partnerships (LP) and that a winery is registered as a general partnership (GPS). Most winemakers work as sole proprietors, with an average estate size of just 3.38 hectares (ha) in Mór Wine Region (MWR). However, this ranges from 0.2 ha to 30 ha. There is not much difference between the average farm sizes in the settlement breakdown, but the largest farms are typically located in settlement Mór.

Tab 1. Basic data of the MWR's wineries. Source: authors' own calculation

Type of enterprise	Number of enterprises	Average estate size
sole/family	16	3.38 ha
primary producer	3	5 ha
LLC	5	18.05 ha
LP	3	8.83 ha
PL	-	-
PS	1	5 ha

Well over half of the wineries have a history of more than 15 years (see Table 2), with only one newly established business exists in the wine region. This is in line with the fact that wineries are among the most stable types of agricultural holdings (Valkó and Kincses 2014). At the same time, the lack of young start-up is a local reflection of the national economic situation.

Tab 2. The age of wineries in the MWR. Source: authors' own calculation

Age of the enterprise	Number of the enterprises
1 year	1
2–3 years	–
4–5 years	–
6–10 years	3
11–15 years	6
15 years, or more	17

It is essential for a business to plan for the long term. This is especially true for winegrowing enterprises, as they may be of seasonal consumer interest due to the nature of the production and the product. To do this, they desperately need a pre-planned marketing and sales strategy. However, the majority of the small, family wineries do not have a clear vision about long-run perspectives due to their own personal aging process. When asked about this, only the usual standard answers were received, the most common of which was “it is not quantity but quality is the question matters”. Interestingly, the opposite has also emerged, in the form of the opinion “to sell more, as soon as possible”. The latter was said by a representative of a LLC producing in a relatively small area. In many cases, an almost complete lack of business acumen could be discovered, as if the producer was not even interested in the potential revenue: “the winery can be found online, and if someone comes in, we’ll sell it (the wine)” and “we won’t go after anyone”. For others, going abroad was mentioned as a goal (“opening abroad”, “we want to show up abroad”, “getting a 3–5 euro per bottle price out there”), which, however, is radically contrary to the opinion expressed by their own winery when filling out another open question. On “How do you rate the foreign trade opportunities of your own winery?” based on the answers to this question, there is almost no winery to sell abroad.

Entrepreneurs who formulated their goals more specifically were characterized by a stronger emphasis on artisan wines (“we are artisan wineries, we only make wine from selected grapes”, “production of quality wine with a slight load on the grapes”) and addressing the younger age group: “good wine for young people”, ‘passionate everyday life’. Many see the possibility of development in the stronger presence of local varieties that can be considered autochthonous: “Hungarian varieties, full-bodied wine”, “Hungarian wines of old times with today's technology”, “Ezerjő (the most famous local quality wine – the authors' explanation) (see Figure 2) must be on the table in Mór”. Unfortunately, catering was hardly mentioned among the goals, with a total of one respondent highlighting it “to be based on rural tourism”.

For comparative purpose we mention that the foreign surveys mentioned above show similar proportions are common on other continents, as well. Even in Western Australia, the production of quality wine has been highlighted by many as a major goal. However, the role of catering and tourism is much more pronounced, accounting for the revenue of most wineries, just as in Hungary (Tomay and Tuboly 2023; Güzel et al 2021; Alonso and Northcote 2010).

From the data in Table 3, it can be seen that many more people sell flowing wine (20 wineries) than bottled wine (13 wineries). The sale of wines is extremely volatile. The sale of wine made from the processed grapes is not present in all wineries either. Less than a third of the producers in the MWR sell wine, the rest only produce for their own consumption. The data in Table 3 reflect that far more people sell unbottled wine (in 20 wineries) than bottled one (in 13 wineries).

Tab 3. Wine sales of the wineries in the MWR. Source: authors' own calculation

		unbottled wine	bottled wine
quantity (hl or bottle)		1–150 hl	500–50.000 items
place of sale	cellar	19 wineries	11 wineries
	restaurant	5 wineries	6 wineries
	supermarket/hypermarket	–	2 wineries
	small shop	–	3 wineries

As a unique story, one of the producers selling unbottled wine does not sell it in his own cellar. He has a contract with a champagne factory – but it is interesting that he launches bottled wine himself in open marketplaces. We can find a winery that does not sell barrels of wine. Nevertheless, this is the winery that does sell bottled wine: it is a company in settlement Mór that sells 40–50,000 bottles of wine a year.

The sale of both unbottled and bottled wine in his/her own cellar is the leading selling strategy. Based on the answers, an average of 90% of the wine produced is sold his/her own cellar. Even the largest producers sell at least 60% locally. This is of great importance in several respects. On the one hand, local sales are also the basis of the wine tourism, with those visiting a cellar spending demonstrably more on wine than those buying it from a supermarket shelf. This is also reflected in the attitude of the producers, who incorporate into their prices the authentic environment of the cellar, the possible additional services, and the “experience” factor, which is difficult to express in money.

There are several wineries that try to attract visitors with a number of extra services. The largest producer in the MWR has its own restaurant in the city of Mór on the cellar line, where, of course, it mainly sells his own wines. The well-known producer of the wine region at national scale has a very wide range of programs, including vineyard tours, team building training and weddings. This, of course, has to do with the fact that his personality is popular and his name sounds good among the wine-conscious public, so many people visit the wine region because of his image. For some producers, wine tourism has recently appeared as an attractive program for guests: participating in a harvest, or even involving the guests in the winemaking process, making their own artisan wine, which is primarily aimed at the urban population that is more detached from the natural environment.

Far fewer can get to consumers by getting to a restaurant. Five wineries (unbottled wine) and the 6 wineries (bottled wine) are not the same. The unbottled wine is typically sold in lower-end restaurants in the wine region (in two pubs – as one respondent put it), while bottled wines are sold in high quality restaurants. Among them we can find a wine bar in the capital (Budapest), which is a key for the Hungarian wine sector. One of the in-depth interviews – among stakeholders – said that local sales of bottled wines are not enough, this must be changed in any way: "why do guests drink Tokaji (the most famous Hungarian wine /Drotár and Kozma 2021/ – the authors' explanation) in a restaurant in Csókakő?" the local mayor asked.

There is an overlap between the wineries which are present and sell among small shops and supermarkets, with one of the largest producers in the whole wine region is present in both categories. The so-called tycoon sells 40% of his bottled wines in these two categories. Of course, the other wineries selling here are also among the larger ones. Supermarkets are usually a safe point for Hungarian wineries. Especially during the COVID-19 epidemic, this type of sale has been one of the lifelines for wineries. It is true that the price of wines sold in this way is not as high as in the case of 'cellar door' type sales and less profitable, but it can still be considered a safe point for survival. For comparative purposes, we must add the finding of Mór to the international examples, which also show that wineries that were able to sell locally and were part of the general food retail business survived the closures better (Loose and Nelgen 2021).

In the case of wines sold at the cellars, we also asked about the organized wine tastings. Although the significance of this attraction in recent years has been restricted due to the pandemic circumstances. The wines sold at cellars is the only way for businesses to introduce and sell their own wines to the general public besides retail traders with long supply chains. Based on the answers, it turned out that the vast

majority of the respondents organizes wine tastings. Only eight of all wineries do not offer their wines for groups.

So the majority of wineries offers tastings for groups, almost everyone in an organized form. Only some of them indicated that they would present their wines to their families, friends and acquaintances. Wineries with public access organize wine tasting shows for groups (this circle covers 13 winemakers). The number and frequency of the incoming groups show a very heterogeneous picture (see Table 4). From the extremely intense three times per week to 5–6 per year, every version happens. What is striking, however, is that all winemakers are reporting a declining intensity as part of a process that has been going on for years. The typical answer was "1–2 per month". If we take the oral terms of intensity "rarely" or "occasionally, for calling" from the point of view of the interpretation, this category occasionally remains the most common answer. However, almost all respondents added the decreasing frequency mentioned above. Several answerers drew the attention to the seasonality of the visits, highlighting the most productive spring and autumn period in this respect.

Tab 4. Number of participants and frequency of wine tastings in the MWR. Source: authors' own calculation

Size of the vinery (hectare)	Number of participants of the visiting group	Frequency of groups
1.5	–	not typical in the past years
30	5–30	1 per month
0.5–1.0	5–6	1 in six months
0.5–1	5–44	1 per month
20	25	1 per month
28	20	3 per week
0.5–1	10	changeable
4.2	10–12	2 per week
0.5	10–15	3 per year
1.5	max. 20	varies
14	7–80	5–6 per year
1.5	10	occasionally, only for calling
0.1–0.3	2–20	1 in two weeks
3.4	5–40	1–2 per month
0.5	150–200	occasionally, only for calling
2.5	3–4	occasionally, only for calling
5	15–20	1–2 per week
3.75	max. 25	rarely
35	extremely varies	4–5 per month
4	5–45	varies, 3–4 per month

Comparing the size of the farms and the amount of wine produced with the frequency of groups coming for tasting, the pre-assumed idea that wine tasting groups come to larger wineries more often becomes clear. Wineries typically accept 1–2 groups per week and 1–2 groups per month, while smaller ones provide responses from 1–2 groups per month to 3 per year. Among them were mainly those who answered "only for calling". In this way, of course, the issue of economies of scale cannot be avoided either. Due to the popularity and the amount of wine produced, the larger wineries can supply many more consumers and visitors, which is a problem for others. If we compare this fact with the above-mentioned willingness to install, it is obvious that the scissors between so called large wineries and relatively small wineries will continue to open.

The number of participants of the groups in the visit is extremely diverse. On average, there are 10–20 people, but we can also find tastings for more than one hundred people. The latter is rather strange, as a representative of a winery with a very small area answered it. Conversations also revealed that winemakers usually like to receive a maximum of a dozen of visitors, they can deal with them to such

an extent that it does not yet go to the standard of tasting. Of the wineries that currently do not offer tasting, only one respondent indicated that they would start this type of activity in the near future.

A similar tasting activity is the Mór Wine Days Festival, which are held on an annual basis, except for the closing period of COVID-19, organized on the first weekend of October each year, and the “We Love Mór Outdoor” event. The latter was established on a private initiative, joined by six local wineries. The wineries welcome their guests outdoors, several times a year, along the cycle path connecting the settlement Mór with the neighbouring Csókakő. In addition to wine, every winery also offers some culinary advantages. Initiatives like this generally have a positive effect on attendance (Topole et al. 2021).

After the closure due to the coronavirus in 2020–2021, web sales and home delivery of wines have become particularly important. The crisis has completely reorganized the wine market and marketing (Loose and Nelgen 2021). According to the data of the National Council of Vine-Growing Communities (NCVGC), the sales of Hungarian wineries could fall by as much as 60–80%. This has encouraged producers to turn to new sales directions. The proportion of web-use wine sales has increased exponentially, of which we can basically distinguish two directions. First is the individual sale of wineries when they even try to provide nationwide coverage for their products. At the same time, the sudden increase in online sales and web-shops has fragmented the sales, and this has provided an opportunity to start businesses that provide background services to wineries (e.g., wine group, 'bottled mail' or wine terrace) (Hegyközségek Nemzeti Tanácsa 2020).

According to our data, the two types of web sales are divided into roughly half among the wineries of MWR which make sales: four wineries have their own web-shop and deliver the wines to customers, and five wineries through intermediaries. It is clear that the businesses that run their own web-shop are larger and better-known players in the wine region, with a reputation and clientele that allow them to do so. Smaller farms, on the other hand, enlist the help of vendors.

In connection with the wine tasting, we were also interested in the accommodation available on site. The picture here is very restrained, with only four of the respondents having their own rooms for rent. The utilization of these is quite low, which is why it was the opinion of several that it is not worth developing one. However, the subjects of the in-depth interviews pointed out that the lack of accommodation of the right quality and quantity has a negative impact on the entire wine region. According to the interviewees' opinion the complex tourism offers (in addition to accommodation and wine tasting, other programs – such as equestrian (horse-riding) tourism), which are currently lacking, as well as ecotourism based on the landscape environment would bring the wine region forward besides fuelling wine tourism (Stojanovič et al. 2021; Rogerson, 2020; Šťastná et al. 2020). The good practice of ecotourism can be seen in the example of Poroszló (Kis and Tóth 2016).

6. Conclusion and discussion

The research series conducted in the Mór Wine Region (MWR), that is a relatively isolated area from the national growth poles (the capital, Budapest and Lake Balaton), as well as the international level. Due to the physical size of MWR, the number of wineries are unable to enter into relationships with major wine companies, so they cannot sell their products through long supply chains. Their almost only option is to sell them locally, at the cellars, which in turn is cumbersome due to the declining number of visitors. The closures caused by COVID-19 severely discouraged on-site tourism, which only increased in the milder periods between closures (Michalkó et al. 2022; Egedy and Ságvári 2021; Medaric et al. 2021). However, their share was far below the turnover of the years before the pandemic. To this end, online sales have become increasingly important. However, in contrast to the larger and better-known wine regions and wineries, the wineries of MWR started from a disadvantage in this segment. The booming online presence that has characterized them in recent years helps a lot in overcoming the relative absence of national and international reputation.

The possible integration efforts of the wine region to national and international markets could provide a partial solution to sales related problems. During the in-depth interviews, the lack of joint actions was bitterly mentioned by the actors in the sector, but especially by the mayors of the municipalities. This

would primarily mean marketing and sales, but several people lacked joint grape processing, which could help those who only produce grapes or produce only small quantities of wine. The construction of such a successful wine region cluster would certainly promote the development of the whole area.

The small size and fragmentation of the wineries is the main problem. Although a process of property concentration has begun since new century, however, the average size is still below the national average. The small size and quantities produced here make it even hard to find a niche market. Most businesses tend to operate only as the self-sufficient, weekend wineries, with their owners most likely earning their main income from somewhere else, echoing the existence of second economy. The rapidly aging local population is also a disadvantage, although the emergence of a rising, striking, young winemakers who have been at the forefront of the wine region as opinion leaders should be highlighted. They are able to reach the younger generation of wine drinkers, taking advantage of today's social media interfaces, who are willing to travel longer distances for a tasting. However, the spectacular local PR campaigns do not necessarily achieve lasting success, precisely because of the complete lack of diverse wine sales.

It must be stated, therefore, that the MWR is able to reach wider public. The image of the area is undergoing a transformation, desperately seeking itself. For the future of MWR, the complex tourism developments would mean a kind of outbreak, even maybe a boom. The creation of innovations would require greater local cooperation among stakeholders.

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