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Nikolay V. Gontar^{1*}

** Southern Federal University, Institute of Tourism, Service and Creative Industries 344006 Bolshaya Sadovaya St. 105/42, Rostov-on-Don, Russia*

AGRITOURISM IN DON VALLEY: GEOGRAPHY AND INSTITUTIONAL PRIORITIES OF DEVELOPMENT

Abstract: The relevance of the study lies in the reassessment of the part taken by institutions in the development of the tourism market and in the diversification of tourism supply at the regional level. In new territories of development of agritourism, it faces the challenge of not only using natural and ecological conditions, but also interacting with existing formal institutions. The purpose of this study is a structural and geographical analysis of the emerging agritourism supply in the Don Valley, and an analysis of compliance of the needs of agritourism actors with the parameters of the institutional environment. The methods of spatial analysis helped us identifying the positional features of agritourism locations in the Don Valley. Based on the measurements of accessibility, we have singled out areas of agritourism locations in the Don Valley. Analysis of business models of agritourism locations, their target segment and their integration into tourist routes made it possible for us to give a qualitative description of the agritourism areas of the Don Valley and define the nature of their involvement in agritourism. Together with the institutional analysis, this made it possible to define discrepancies between the tourism management system and the nature of agritourism development in the Don Valley. The results made it possible to formulate measures for transforming the institutional environment, and can also be useful in developing strategic documents and plans for development of agritourism in the regions diversifying the tourist supply.

Keywords: tourism, rural tourism, enotourism, Rostov region, agritourism development

Introduction

The global and Russian tourism markets are showing significant growth rates. The international market continues its active post-pandemic recovery: according to UNWTO (UN Tourism Barometer), in 2024, the level of tourist arrivals is expected to exceed the level of 2019 by 2%.

¹ passat-01@mail.ru (corresponding author)
Nikolay V. Gontar (<https://orcid.org/0000-0002-7310-1828>)

In 2024, 84 million tourist trips are expected in Russia, an increase of 8.6% compared to 2023 (National project «Tourism and hospitality industry»). In 2023, the contribution of tourism to Russia's GDP reached 4%, and Russians' spending on recreation reached 9% in the spending structure. In the scope of tourism services in the Russian Federation, the share of agritourism was 7%, more than 100 tour operators in Russia offer wine tours, for example. The projected share of revenue from tourism services for agricultural enterprises may bring the tourism segment of the Russian agro-industrial complex closer to Italy where by 2020 the cost of agritourism services amounted to 2.6% of the revenue of the agricultural sector.

Thus, the background for generation of agritourism as a significant tourist trend has been established in Russia, which brings the sector growth rate closer to the one in the EU and China (Dickson & Arcodia, 2010; Zhong, 2021; Flemming, 2007). In particular, since the early 1990s, rural areas of Europe have been considered not only as a place for agricultural production, but also as an area for rural tourism (Saxena, 2005; Saxena et al., 2007). In China, agritourism not only functions as a tool for reducing the concentration of tourist load by redistributing tourists by season and by destination (Ndhlovu, 2024), but it also serves as a stimulus for local economic growth (Lin, et al., 2024). As a unique local and regional intangible cultural heritage, agritourism is a source of formation and strengthening of competitive advantages, a reflection of history and identity, an element of brands of countries and regions, which is reflected in the implementation of UN TOURISM initiatives (Best Tourism Villages, Gastronomy Tourism Events, Wine Tourism Events, gastronomy tourism projects, publishing projects such as UN Tourism and ARAEX GRANDS Foundation guide to symbolic wine routes «The Wine Routes of the World»).

Agritourism is the basis of world famous brands such as California's Napa Valley where 450 wineries welcome over 4.5 million tourists a year, offering also restaurants (including Michelin-starred ones), spas, music festivals and events (<https://www.visitnapavalley.com>), and the Rhine Valley (Oberes Mittelrheintal) which is a UNESCO World Heritage Site. Research on the regions of agritourism (and wine tourism) development emphasizes the role of institutions. For example, a study of 292 agritourism farms in Tuscany (Domi & Belletti, 2022) highlights both the capacity of governing authorities to support agritourism and the effectiveness of agritourism companies' networking. Based on the study of wine-making in Bordeaux, Gergaud et al. (2017) conclude that some subregions could benefit from promotion programs implemented by formal institutions at the regional level. Interest in agritourism issues (including wine tourism) is also very high in the New World and Australia, as evidenced by the extensive review by Marco-Lajara et al. (2023). An example of this is the study by Torres et al. (2021) that highlights both the development of wine tourism infrastructure and at the same time the complexity of the range of factors shaping the tourist flow to wineries, using the example of Chile.

In Russia, the priority area for development of agritourism is the Don and the Kuban river valleys in the south of Russia (including the Black Sea coast). According to tourism development plans (<https://www.economy.gov.ru>), by 2030 out of 140 million potential tourist trips in Russia more than 70% will be to the south of Russia and the North Caucasus. This, in turn, creates the problem of load on limited sea coasts. Thus, according to the assessment made by the Research Centre Kartfond, the ecological capacity of traditional places of mass recreation in the Rostov region and the Krasnodar region has been ex-

hausted: with a standard of 5 sq. m/person at seaside resorts, by 2024 the indicator decreased to 2-3 sq. m; the load on the beaches of the Rostov region was 3.5-8.6 sq. m. This also contributes to the relevance of development of agritourism as a means of relocating the tourism supply.

At the same time, turning agritourism into a competitive advantage requires interaction between the business developing agritourism and the local institutional environment. In such areas, institutions become an essential factor in implementation of the agritourism potential and formation of the corresponding specialization. In this regard, it is relevant to develop an algorithm for assessing the interaction between the agritourism business and institutions and make conclusions that allow transforming the institutional environment for more effective development of agritourism as an innovative specialization.

In this regard, the purpose of research was to analyse the geography of agritourism emerging in the Don Valley (Rostov region), develop methods for assessing the role of regional institutions in supporting agritourism, and identify institutional problems and priorities for supporting the development of agritourism.

Materials and methods

The analysis of the current state and trends of the agritourism specialization of the Don Valley reflects the need to search for forms and tools for creating a revealed comparative advantage by diversifying the tourism supply, and also meets the task of finding strategies for using the territory taking into account ESG priorities. The Don Valley is characterized by both long-term and situational elements of the development of agritourism specialization. Sustainable long-term factors are a developed agricultural sector. The exhaustion of the capacity of the limited sea coasts of the Rostov region is also important. The current incentives for development of a new agritourism specialization for the Rostov region are the reduction of the traditional tourist flow to Rostov-on-Don due to the closure of the airport and the reduction of congress and exhibition activity. At the same time, refocusing of the tourist flow in the Russian Federation to domestic tourism and mass autotourism to the Black Sea generates a flow of transit autotourists through the territory of the Rostov region along the federal highway M4 and highways in the east of the region.

The current contribution of tourism to the regional economy places tourism among the “second-tier” industries. Its transformation into one of the prominent specializations can be achieved if the institutional environment corresponds to the current state and trends for development of agritourism. This correspondence is the subject of analysis, the task of which is to develop proposals for transformation of the institutional environment in the direction of consideration of the current state and needs of creating a new competitive advantage of the tourism industry based on agritourism.

Data base

The innovative nature of agritourism in the Don Valley (in the Rostov region) determines the scarcity of studies of this tourism segment in the region. Thus, in (Kazmina et al., 2020) tourist locations in 17 rural districts of the region have been analyzed but without reference to their agritourism focus. In addition, a coherent subregion for agritourism localization has not been identified although distribution of typical recreation clusters of agritourism to

districts of the Rostov region has been presented, which forms the basis of the structure of agritourism cluster of the Rostov region.

Degtyaryova et al. (2023) gives a SWOT analysis of rural tourism development in Rostov region, specifying directions of management policy in this area; however, the current structure of supply in the field of agritourism and the institutional conditions for its development were not systematically studied.

At the same time, the analysis of the institutional environment is essential, since the rural tourism product is the result of synergy of formal and informal connections of economic actors (Meng & Cheer, 2020; Petrou, 2007; Su et al., 2023), interactions between farmers and the state (examples of which are Greece, Croatia, Germany, Sweden). In the areas of developed agritourism, the institutional support for agritourism is very diverse and includes assistance funds, the practice of strategic planning of activities (Hatipoglu et al., 2022). As evidenced by the example of China (Liu, et al., 2020), the integration of the activities of the central government and provincial governments is important in the system of formal institutions. In the United States, such support includes (Yeager et al., 2023) the infrastructure for promoting business initiative in the agricultural sector, affecting the interests of both tourists and economic actors offering agricultural tours and agricultural products.

An important component of the institutional field is business. It provides modernization impulses for development (Gontar, 2020) and diversification impulses (Brandth & Haugen, 2011) at the regional level.

Study Area

The spatial object of the study is the Don Valley that is the most developed, populated and tourist-attractive part of the Rostov region in the lower reaches of the Don River, from the mouth of the Tsimlyansk Reservoir to the mouth of the Don River in the Taganrog Bay.

The Don Valley has a predominantly flat landscape; the maximum terrain height in the Rostov region does not exceed 250 meters above sea level. The main natural zone - the steppe - turns into semi-desert in the east of the region. The predominant type of soil in the region is highly fertile southern and ordinary chernozems (rich black soil), which allow for high yields. The Don Valley is located at the same latitude as Burgundy, but it differs from the French region in a more pronounced temperature difference (hotter summers and temperatures below zero in winter). The east of the region is subject to aridization and droughts (Parfenova & Dashkevich, 2021). The climate of the region is moderately continental; the amount of precipitation decreases from west to east (from about 600 to 400 mm) with a summer maximum of precipitation (Climate data for...). High summer temperatures and a long vegetation season ensure fruiting of vineyards. However, covered grape cultures that require protection from frost are prevalent in the region.

The population of the region (4.2 million people, the 6th region of Russia in terms of population) is also concentrated on the Lower Don and in the Azov region where Rostov-on-Don (1.2 million people), the cities of the Rostov agglomeration (Azov, Aksai, Bataysk, Novocherkassk), and Taganrog are located, and the main demand for visiting agritourism locations is created.

The North-South transit transport corridor passes through the region, which provides automobile transit of tourists from Central Russia to the Black Sea resorts through the western and eastern parts of the region. In 2024, transit along the M4 Don highway reached 7 million people (<https://kuban.rbc.ru/krasnodar/freenews/6660893b9a794738bf4e6952>). According to the forecast of the Ministry of Economic Development, by 2030 the number of car trips will increase to 50 million (<https://rg.ru/2024/07/25/kolichestvo-ezhegodnyh-avtomobilnyh-turpoezdok-vyrastet-do-50-mln-k-2030-godu.html>), and a large number of autotourists will be received by the M4 Moscow-Novorossiysk highway.

Analysis data

The research is based on the use of data from official sources, as well as data from companies implementing projects in the field of agritourism in the Don Valley (Rostov region) – (Table 1).

Table 1. Data structure for analysis of agritourism potential of the Rostov region

Object of analysis	Information resource	Predominant data period
Investment in the industry	TOURISM.RF STATE CORPORATION, reports of the Government of the Rostov region	2024-...
Socio-economic indicators	Statistical and industry information (rosstat.ru)	2022-2024
Projects in the field of agritourism	RBC Portal (PROTourism, Rostov-on-Don, Caucasus); Expert-Yug Portal	2020-2024
Projects and problems in the field of tourism and agritourism	Federal and regional sources of business information, Ministry of Economic Development of the Russian Federation	2020-2024
Strategies, programs and budget parameters of the industry	Government of the Rostov region	2018-...
Lists of agritourism objects, routes and events	Tourism portal (https://visitdon.ru/)	2024-...
Number and positions of enogastronomic supply	Rating structures in the field of enogastronomy Roskachestvo (https://rskrf.ru/vgr/), Russian Union of Travel Industry (https://www.tastesofrussia.ru)	2023-...

Information from the tourism portal was used to specify the profile of industry actors. Company websites were a source of information on the legal structure of projects in the field of agritourism.

The institutional analysis was based on information from regional statutory instruments. The goal of the analysis was to make a holistic geographic assessment of the agritourism area. Such an assessment made it possible to zone the agritourism area comparing it with areas of generation of demand and to identify the degree of accessibility of agritourism locations.

Despite the information content and accessibility of positional analysis methods, no such studies have been conducted with respect to agritourism locations in the Don Valley. Moreover, there was no zoning with regard to availability of tourist supply.

With reference to the Don Valley, it is also required to make a primary analysis of the state of institutions in the field of agritourism support, and to identify the compliance of the institutional parameters of formal institutions with the types of agritourism in the Don Valley.

Research methods

At the first stage, the assessment of the geography of agritourism in the Don Valley included a spatial analysis of agritourism locations, for which an assessment of the position in relation to the demand generation centres (Rostov-on-Don and the main transit highways) was used.

The calculations were based on the spatial position of agritourism locations, information about which was posted on the official tourism portal of the Rostov region (<https://top.visitdon.ru/ru/>), and on the position of other existing agritourism locations. Accessibility was assessed by calculating the distance along the actually used roads in relation to travel by car (via online mapping services). The regional centre (Rostov-on-Don) was chosen as the departure point since it was a point of local demand generation and a departure point to agritourism locations for tourists for whom Rostov was a transit stop.

Accessibility was also assessed by access time, taking into account the classification of the roads (their class). Differentiation of the position of agritourism locations depending on the distance and time of access to them allowed us to zone the agritourism area of the Don Valley. For an overall characterization of the areas, such objective characteristics of the points as demand (based on integration of locations into official tourist routes) and demand focus (local or transit, mass or niche) were used in addition to their location.

The institutional analysis was based on specifying the compliance of the entity of administrative and legal support for tourism with the profile of current actors in the field of agritourism. The preliminary stage of the analysis was identification of models of organizing agritourism locations in the Rostov region. Such models were formed based on the assessment of the combination of the type of business (small, large, municipal entities or non-profit projects) and the nature of agritourism in its activities (core activity or a tool for diversifying the main business). This made it possible to identify the predominant type of business participation in agritourism in the Don Valley.

Further, the elements of the formal institutional environment were analysed according to such aspects as:

- the structure of tourism management authorities in the region
- the presence of tourism and agritourism in strategic documents and priorities of regional authorities.

Based on this analysis and its comparison with the profile of companies operating in agritourism of the Don Valley, we determined the following: institutional limitations of development of agritourism in the Don Valley, and areas for corrections in individual significant institutional spheres.

Stages of analysis

The first stage of the study was to specify the agritourism areas of the Don Valley based on spatial parameters and qualitative characteristics. The second stage was to describe the institutional environment for development of agritourism locations.

The first thing to do was to describe different types of agritourism locations based on information about such locations on websites and on the tourism portal of the Rostov region. Assessment of distances and access times allowed us to outline the areas of agritourism development.

Supplementing the description of areas with qualitative characteristics of demand allowed us to give a summarized description of the agritourism area of the Don Valley for the first time. The preliminary stage of assessing the institutional environment for development of agritourism in the Don Valley was the analysis of typical business models of companies in the sphere.

The institutional analysis (of the regional management system in the tourism sector, strategic documents of the Rostov region) served as the basis for the conclusion:

- on the conformity of such institutions with the nature of business actors in the field of agritourism in the Don Valley
- on the tasks of transforming agritourism into a revealed comparative advantage.

As a conclusion for the management system from such a comparison, we specified directions for correcting existing regional management practices for the tourism management sector in the region.

Limitations of the study

The objective limitations of the study were the chronological framework due to the short (albeit active) history of the development of agritourism as a specialization in the Don Valley. Moreover, the limitation is related to the limited number of locations analysed, but the list of such locations is exhaustive and is explained by the initial stage of specialization development. In addition, already at this stage it is possible to specify the spatial features of agritourism locations and link their typology with the distance from the places of demand generation.

The analysis of the institutional environment focuses on the analysis of mainly regional institutions, while the activities of the federal ones are noted in general terms, which is justified, since they are not always addressed to agritourism and the Don Valley. All available data on the current state of institutions and state incentives for development of agritourism and the agricultural sector as a basis for development of agritourism are presented.

The identified limitations narrow the time range of the study and introduce certain adjustments to the interpretation of the results; however, in our opinion, they do not have a significant impact on achieving the goal of the research in general.

Results

Rostov region is the second most important (after Krasnodar region) agricultural region of Russia (5.3% of Russia's agricultural output), but it has traditionally been poorly represented on the tourist map, especially in comparison with the neighbouring Krasnodar region. It is located in the subtropical zone and it is the region of mass seaside recreation (in 2023, the number of tourist trips to the region amounted to 18.1 million people (11.4% of the Russian Federation level), and overnight stays amounted to 100.1 million (15.1% of the Russian Federation level)). Rostov region shows an increase in tourist trips in the post-

COVID period, which is also reflected in the growth of the share in the indicators of the tourism industry of Russia (Table 2).

Table 2. Data trend of the tourism in the Rostov region

	Russia as a whole	Rostov region	The share of the region in the Russian Federation %
Number of tourist trips, million units			
2022	153,9	2	1,3
2023	158,7	3,4	2,1
Number of overnight stays, mln. units			
2022	683,4	4,8	0,7
2023	664,6	7,4	1,1
The number of vacationers accommodated in hotels, guest houses, etc.			
2022	64,5	0,87	1,4
2023	77,1	1,3	1,7
2024 (I-VIII)	58,5	1,2	2,1

Compiled according to (<https://www.economy.gov.ru/material/directions/turizm/>)

As an independent segment of the tourism market, the agritourism sphere of the region is gradually becoming recognizable due to participation of the region's enogastronomic products and events in ratings and competitions. Gastronomic experiences are an important tool for tourism branding (Jerez, 2023). At the same time, culinary tourism, as a rule, integrates local culture and agriculture (Wondirad, 2021), which is also true for the Don Valley.

Rostov region has a short history of development of modern agritourism brands (with the exception of the Soviet wine brand "Tsimlyanskie Vina"). One of the modern recognizable brands of the region – "Vina Vedernikov" - belongs to Abrau-Durso company relying, however, on the Don terroir in production.

Today, wines from the Rostov region producers are regularly included in the Forbes rating and are noted in the Wine Guide of Russia (34 wine titles). In the 50 Best Tastes of Russia rating, the Don Valley is presented in the Best Gastronomic Tourism Sites (1 site) and the Best Wine Farms (4 farms).

The basis of the region's agritourism specialization is vineyards and wineries. In total, there are 17 such farms in the region, the area of fruit-bearing vineyards is 1.6 thousand hectares (in total about 2.5 thousand hectares), 28% of which are autochthonous varieties. Since 2020, over 500 hectares of new plantations have been planted in the region. Development of viticulture is based on cultivation of a number of autochthonous grape varieties in the Don Valley (Tsimlyansky, Krasnostop Zolotovskiy, Sibirkoviy, Pukhlyakovskiy) in five districts in the lower reaches of the Don River (Tsimlyansky, Martynovskiy, Konstantinovskiy, Azovskiy, Ust-Donetskiy) (fig 1).

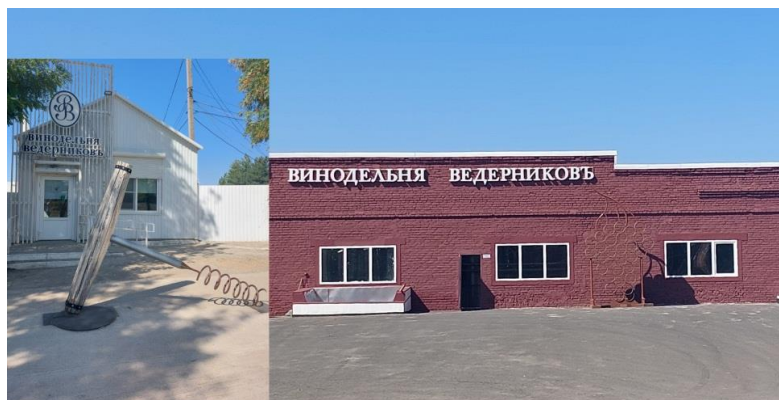


Fig. 1. Winery Vedernikov production and shop (all photos taken by the author)

In 2020-2023, wine production in the region exceeded 1.35 million dal (<https://rosstat.gov.ru>). However, in 2023, there was a decline in the grape harvest, and in 2024, cold weather caused crop losses in a number of northern and central districts of the region, which demonstrates the susceptibility of the regional agricultural sector to weather risks.

In general, the Don Valley agritourism locations have five specializations (Table 3):

- Ethnocultural locations with enogastronomic and historical components
- Wineries, including tours and tasting programs
- Commercial and industrial rural enterprises with industrial tours
- Landscape parks and zoos with ethnographic activities
- Horse clubs and horse-breeding clubs

Table 3. Forms of agritourism supply in the Don Valley (Rostov region)

Ethnocultural locations with enogastronomic and historical components	
Starozolotovskiy Farm	It is a part of the association <i>The Most Beautiful Villages and Towns of Russia</i> , the international association <i>Beautiful Villages of the World</i> . It includes elements of the history and life of the Cossacks during the civil war and revolution in Russia. The basis of the exposition is decorations (Cossack huts), objects of culture and life of the Don Cossacks of the early 20th century.
Museum of the History of the Don Viticulture in Novocherkassk	It shows the history of viticulture and winemaking on the Don, antique artefacts (vessels for winemaking, antique dishes for wine), the culture of grapes on the Don (8th-10th centuries), including the period of grape cultivation by the Cossacks.
Museum of Cossacks, Viticulture and Wine-making in Starocherkasskaya stanitsa	Starocherkasskaya stanitsa is the first capital of the Don Cossacks. The museum is located in a building from the end of the 18th century, exhibiting household items, samples of weapons, religious books of the Cossacks of the 18th-20th centuries, archival photographs, musical instruments, maps and antique items. There is a wine cellar with a collection of wines of the Don Valley.
Museum of the History of Don Winemaking, Pukhlyakovskiy farm	Since 1814, the <i>Model Wine Cellar</i> has been established here, showing the history of the transfer of winemaking experience by masters from Germany. The farm is the venue for Donskaya Loza festival of winegrowing and winemaking farms of the region.
Wineries, including tours and tasting	
Vedernikov Winery	One of the pioneers of covered viticulture and premium winemaking in the region. It has 160 hectares of vineyards, a quarter of which are autochthonous varieties.
Villa Zvezda (2013)	It has 100 hectares of vineyards, grapes are harvested manually. The winery bases its production on the terroir between the Sal and the Don rivers. The winery conducts tours covering the entire process of wine production.
Arpachin's wines	A modern winery with European equipment and its own vineyards near the confluence of the Manych River and the Don. It has its own vineyards, including unique Don varieties.
Vina Bani	A family winery located between the Sal and the Don rivers; it has European and Don autochthonous grape varieties.
Serdyuk Dacha	A family winery located in Novocherkassk. The vineyards are located in Konygin farm of Ust-Donetsk district and have the Krasnostop Zolotovskiy, Saperavi, Sibirkovy varieties.
OJSC Tsimlyanskiye Vina	One of the largest wineries in Russia with a full production cycle. Since 1786, grapes have been grown here and still and sparkling wines with the protected geographical indication Don Valley have been produced. The production has 500 hectares of vineyards, including autochthonous varieties.
Usadba Sarkel	The winery on the shore of the Tsimlyansk Reservoir has 13.2 hectares of vineyards, a guest house, a cheese factory where master classes are held, and a restaurant.
Elbuzd Winery	The farm has 70 hectares of vineyards southwest of Rostov-on-Don and has been developing production since 2010.
Commercial and industrial rural enterprises with industrial tours	
Petrovskiy Bio-Farm	An ecological enterprise founded in 2010 and is the only producer of organic products in the south of Russia.
Semikarakorsk Ceramics Plant	A folk art and craft enterprise that produces artistic faience. Visitors are offered a tour, a master class in making artistic products.
De Volan Cheese Factory (Novocherkassk)	Produces cheeses using raw materials from local producers according to original recipes.
Rybnyy Khutor Trout Farm (Melikhovskaya stanitsa)	Since 2017, it has been growing valuable fish species both industrially and in open water. Conducts tours.
Donetsk Valley	Growing seedlings of fruit trees, <i>Grow Your Own Seedling</i> program for visitors, invites visitors to harvest
Landscape parks and zoos with ethnographic activities	
Oleniy Ruchey Eco-Park	Reproduction of valuable animal species in enclosure conditions (sika deer, moufflon, European roe deer, fallow deer, European deer, elk). The park conducts tours and thematic events.
Malinki Southern Bird Park	A modern ornithological park with 2,500 animals and birds. Works to preserve and increase the genetic diversity of animals.
Loga Park (since 2012)	Area of 16 hectares. The landscape park is located in the southern direction of the M 4 highway and has a small zoo and recreation areas.
Zateryanny Mir (Lost World)	An open-air historical reconstruction museum presents interactive educational programs.
Horse clubs and horse-breeding clubs	
Gelios Donchak Territory	An initiative family project to preserve the Don horse breed (Donchaks).
Horse Village	Horse breeding enterprise of a large Rostov clothing manufacturer <i>Elis</i> (as an object of investment and diversification of the main business).

Compiled according to (<https://www.visitdon.ru/>)

Some of the locations presented are included in official tourist routes:

- Big Cossack Circle Ethnographic Route,
- Don Valley Enogastronomic Route. The Don Valley route is included in the list of National tourist routes.

At the same time, the Tourist Map of Russia does not reflect the agritourism potential of the region today: the emphasis is on its other attractions. The existing infrastructure of agritourism in the Don Valley is the basis for agritourism activities. Event-based activities are a prerequisite for sustainability of the tourism industry as a whole (Hede & Stokes, 2009). The Don is characterized by events that have historical roots and folklore traditions: Donskaya Loza Don Viticulture and Winemaking Festival, Donskaya Ukha Gastronomic Festival and events organized by Petrovsky Biofarm. Event-based activities are gradually becoming recognizable and attracting tourists. Thus, summer visits to the *Tikhii Don* Ethnographic Museum in Starozolotovskiy farm (where enogastronomy programs are implemented) reached 5,000 people in 2022 (fig 2); the industrial tourism programs of Tsimlyanskies Vina company were visited by 40% more tourists in 2023, including due to the growth of transit tourists from Siberia and the Urals.



Fig. 2. Starozolotovskiy (tourist center and restaurant)

The Russian Union of Travel Industry awarded *Gulyaem Po Donu* Gastronomic Project the Grand Prix as the *Best Gastronomic Tour* in the All-Russian competition, and *Vinny Simpasion* Tour received second place; the *Villa Zvezda* Winery was marked on the Gastronomic Map of Russia.

Assessment of the geography of agritourism locations

Assessment of the geography of agritourism locations in the Don Valley as their relative accessibility from the main areas of demand (regional center and its agglomeration) allows us to specify several areas that accommodate different numbers of agritourism locations (Table 4):

Table 4. Accessibility of agritourism locations in the Don Valley

Areas	Distance, from the Rostov-on-Don, km	Travel time from Rostov-on-Don	Road class (number)	Tourist points of visit
1	35-50	0.5-1 h	Federal M4, regional (60K-4.1, 60K-61, 60H-82)	Gelios Donchak Territory; Horse Village; Elbuzd Winery; Serdyuk Dacha; Museum of Cossacks, Viticulture and Winemaking in Starocherkasskaya stanitsa; De Volan Cheese Factory (Novocherkassk); Museum of the History of the Don Viticulture in Novocherkassk
2	70-80	1-1,5 h	Federal M 4, regional 60K-83	Malinki Southern Bird Park. Arpachin's wines
3	120-150	1,5-2,5h	Federal M4, regional (60K-14, 60K-12, 60K-11, A-280)	Loga Park, Semikarakorsk Ceramics Plant, Rybny Khutor Trout Farm (Melikhovskaya stanitsa), Museum of the History of Don Winemaking, Pukhlyakovsky, Zatoryanny Mir (Lost World), Petrovsky Bio-Farm
4	155-245	More than 2,5 h	Regional (60K-1060K-1160K-14)	Starozolotovskiy Farm, Oleniy Ruchey Eco-Park, Vedernikov Winery, Villa Zvezda, Vina Bani, Usadba Sarkel, OJSC Tsimlyan-skie Vina

Compiled according to (results of research)

Thus, according to the criterion of accessibility by time, it is possible to indicate the distribution of agritourism locations in 4 areas, the last of which is significantly distant to the east from the regional centre and federal highways, but it can attract transit traffic from the Volga region and the Urals. Qualitative assessment of agritourism locations takes into account the nature of demand. In case of transit, the interest of tourists can only be short-term, due to which locations remote from the regional centre and federal highway and locations not included in organized group routes can be excluded from the locations attracting the transit flow (Table 5).

The second parameter is the mass/niche nature of demand. It is mass for entertainment parks and locations near Rostov and highways, but it is niche for wineries and locations offering industrial tours. Tourists who come to the region specifically do not focus on agritourism locations, but during their stay they can visit them as part of local tours.

Table 5. Level of involvement of agritourism locations in servicing the demand

	«Big Cossack Circle»	«Don Valley»	Target tourist flow	Nature of demand
1 area				
Gelios Donchak Territory	-	-	local	Niche
Horse Village	-	-	local	Niche
Elbuzd Winery		+	local, transit	Niche
Serdyuk Dacha	-	-	local, transit	Niche
Museum of Cossacks, Viticulture and Winemaking in Starocherkasskaya stanitsa	-	-	Local, transit	Niche
De Volan Cheese Factory (Novocherkassk)	-	-	local, transit	Niche
Museum of the History of the Don Viticulture in Novocherkassk	-	-	local, transit	Niche
2 area				
Malinki Southern Bird Park	-	-	local and transit	Mass
Arpachin's wines –		+	Local, transit	Niche
3 area				
Loga Park	-	-	Local, transit	Mass
Semikarakorsk Ceramics Plant	-	+	Local, transit	Niche
Rybny Khutor Trout Farm (Melikhovskaya stanitsa)	-	-	local	Niche
Museum of the History of Don Wine-making, Pukhlyakovsky farm	+	-	local	Niche
Zateryanny Mir (Lost World)	+	-	local	Niche
Petrovsky Bio-Farm	-	-	local	Niche
4 area				
Starozolotovskiy Farm	+	+	Local, transit	Mass
Oleniy Ruchey Eco-Park	+	-	local	Niche
Vedernikov Winery	-	+	Local, transit	Niche
Villa Zvezda	-	+	Local, transit	Niche
Vina Bani	-	+	local, transit	Niche
Usadba Sarkel	-	+	Local, transit	Niche
OJSC Tsimlyanskies Vina	-	+	Local, transit	Niche

Compiled according to (<https://www.visitdon.ru/> and results of research)

Taking into account positional factors makes it possible for us to describe the agritourism areas of the Don Valley by the parameters of accessibility and tourism supply (Table 6, fig. 3).

Table 6. Areas of agritourism locations of the Don Valley (Rostov region)

Areas	Distance, km, from the regional center (Rostov-on-Don)	Road class	Specialization	Prevailing demand coverage	Demand parameters
Area 1	35-50 (0.5-1 h)	Federal/ regional	Enogastronomic, Horse breeding Museums	Minimal	Niche/ local and transit
Area 2	70-80 (1.5 h)	Federal/ regional	Enogastronomic, entertainment	Significant	Mass/ niche
Area 3	120-150 (1.5-2.5 h)	Federal/ regional	Enogastronomic, rural, entertainment	Significant	Niche
Area 4	155-245 (more than 2.5 h)	Regional	Enogastronomic	Full	Niche

Compiled according to results of research

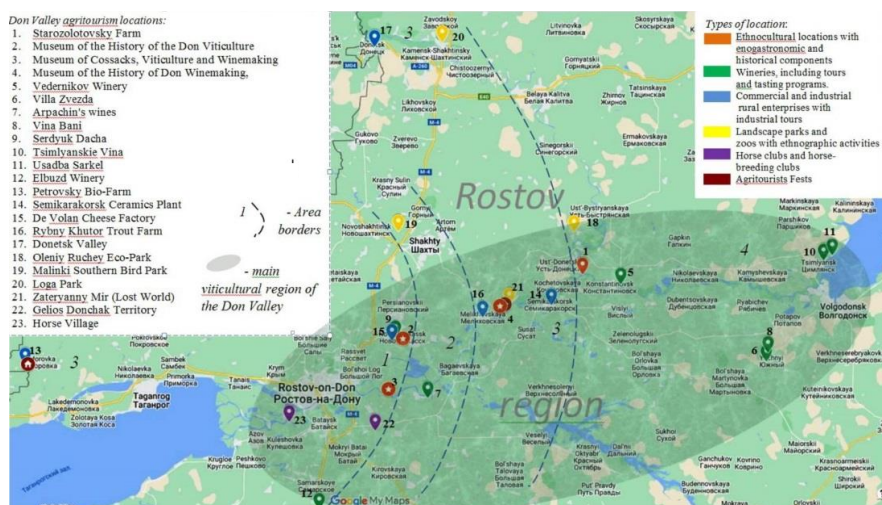


Fig. 3. The agritourism areas of the Don Valley (based on the results of research)

Zoning demonstrates the differentiation of not only the potential for demand generation, but also the specialization of agritourism areas depending on their distance from the centres of demand generation. It is important that all locations remote from the areas of active demand are now included in tours, which increases their availability.

Tourism support institutions of the Don Valley: principal challenges and proposed solutions

In 2022, the volume of private investment projects in the tourism sector in the Southern region of Russia approached 500 billion rubles. The Rostov region does not represent the primary focus for tourism investment in the southern region of the country (the seaside Krasnodar krai is such). Nevertheless, agritourism projects in the Rostov region have also attracted the attention of investors and entrepreneurs in the agricultural sector, as evidenced by the diverse range of project formation models observed in this particular segment (Table 7).

Table 7. Models of organization of agritourist locations in Rostov region

	Small business	Large business	Municipal and non-profit organizations
Tourism as a core business	Zateryanny Mir (Lost World)	Loga Park, H. Starozolotovskiy, Malinki South Bird Park	Museum of the History of the Don Viticulture in Novocherkassk, Museum of Cossacks, Viticulture and Winemaking in Starocherkasskaya stanitsa Museum of the History of Don Winemaking, Pukhlyakovskiy farm
Tourism as a direction of diversification of activities	Arpachin's wines, De Volan Cheese Factory (Novocherkassk), Semikarakorsk Ceramics Plant, Rybny Khutor Trout Farm, "Donetsk Valley," Petrovskiy Bio-Farm, Usadba Sarkel, Elbuzd Winery, Serdyuk Dacha, Villa Zvezda, Vina Bani, Oleniy Ruchey Eco-Park	"Vedernikov Winery," OJSC Tsimlyanskies Vina	Gelios Donchak Territory

Compiled according to results of research

Thus, small wineries and other small forms of organization constitute the core of agritourism in the region. Concurrently, large companies organize a number of locations, which is a common practice in amusement parks and the ethnic hamlet of Starozolotovskiy. The latter was developed with investments from the owners of Sistema JSFC, a prominent Russian holding company (contribution to the Russian economy is 0.6% of GDP), and Steppe, a regional agricultural holding. Concurrently, the project aligns with the model of fostering trust at the local level (Czernek & Czakon, 2023) by virtue of its development within the boundaries of the hamlet. Consequently, alterations to the architectural design of buildings and streets have influenced the settlement situated outside the territory of the ethnic hamlet.

Additionally, Vedernikov Winery is currently a division of a significant proprietor, the Abrau-Durso wine company, which is based in the Krasnodar region. For the majority of small agritourism businesses, the regional institutional environment is a significant factor, both in terms of their core winery and agrarian operations and the successful implementation of tourism projects.

Institutions as a tool for positioning agritourism in the Rostov region

The institutional framework for promoting the development of enterprises developing agritourism is constituted by joint measures at the federal and regional levels. At the national level operate the National Project "Tourism and Hospitality Industry", which includes such sections as "Development of tourism infrastructure", "Increasing the availability of tourist products" and "Improving management in the field of tourism". The latter aims to increase the contribution of tourism to the GDP of the Russian Federation to 5%, raise the number of tourist trips to 140 million per year (in 2023, 78 million domestic tourist trips were made), to create 582 facilities and 284 complex tourist projects

(https://www.economy.gov.ru/material/directions/turizm/nacionalnyy_proekt_turizm_i_industriya_gostepriimstva/).

In the agrarian sphere, the Federal Program "Stimulating the Development of Viticulture and Winemaking" (as a condition for the development of viticulture in the regions) aims to increase the area of fruit-bearing vineyards by 35% before 2030 through investments from the budget of the Russian Federation in the amount of 26.4 billion rubles (<https://expertsouth.ru/articles/pochemu-v-2024-godu-rossiyskomu-vinodeliyu-grozit-krizis-pereproizvodstva/>). These funds are earmarked for grants aimed at the development of family farms, production, and agritourism.

Grants of the Ministry of Agriculture of the Russian Federation up to 10 million rubles have been distributed to the "Agritourist cluster "Bio Hamlet Petrovsky" and four wineries in Martynovsky, Tsimlyansky, and Azovsky districts in the Rostov region. These grants have provided support for companies in the agricultural sector that are engaged in the development of tourism.

In 2023, the Rostov region provided substantial support for the tourism industry, including through federal budgetary allocations. This amounted to over 270 million rubles, with financial assistance for 10 projects related to the construction of glampings in the region reaching 198 million rubles (https://advis.ru/php/print_news.php?id=2154FAB0-7E94-884E-94C5-1A0C2A61D598). In 2024, the region received 89 million rubles from the Russian Federation budget as part of the national project (<https://rg.ru/2024/04/09/reg-ufo/na-razvitie-turizma-v-rostovskoj-oblasti-vydeleno-89-mln-rublej.html>). One area of funding is the completion of construction of glampings. In addition, more than 60 million rubles are allocated to support viticulture in the region every year (<https://rostov.rbc.ru/rostov/freenews/6405d22e9a794765d95037e1>).

Management institutions in tourism

The Rostov region authorities are responsible for the direct administration of the Don Valley tourism development. The structure of tourism management bodies is a significant element of the institutional environment, due to the importance of state participation in the development of most agritourism companies.

In the context of the formal institutions of tourism management in Rostov region, it should be noted that there is no specialized "tourist" Ministry in the region (Table 8).

Table 8. Elements of tourism management structure in Rostov region

	Authority	Subdivision	Major functions
1.1	Ministry of Economy	Tourism development and interregional relations department	Coordination of projects with the Government of the Russian Federation
1.2	Autonomous Nonprofit Organization Agency for Tourism and Business Communications of the Rostov Region.		Promotion of the region's tourism opportunities
2.1	Ministry of Agriculture and Food Products	Food and Processing Industry Department (Division of Winemaking, Viticulture and Exhibition and Fair Activities)	Supervising the development of viticulture, winemaking industry
3.1	Department of Consumer Market of the region		Coordination of alcoholic beverage sales
4.1	Interagency Tourism Coordinating Council under the leadership of the Vice-Governor		Summarizing the situation in the regional tourism in a consultative mode

Compiled according to <https://www.donland.ru/>

The regional government has not designated tourism potential development management as a discrete area of focus, and the status of the units tasked with tourism development is relatively low. The functional objectives of the management bodies are reflected in the strategies and programs that guide their activities. The strategy of social and economic development of the Rostov region does not contain any mention of agritourism (or rural tourism). The document identifies several challenges associated with tourism in the region, including inconsistency of tourism, support and transportation infrastructure with the tourism potential, inadequate awareness of the region's tourist and recreational potential, and a shortage of qualified personnel. However, it lacks an explicit focus on diversifying tourism as a strategy for accelerating its growth. Furthermore, the designation of seven tourist zones in the Rostov Region Strategy divides the comprehensive zone of winemaking, enogastrotourism, and event activities in the Don Valley into multiple segments, thereby obscuring the concept of the spatial core of agritourism development.

In the system of regional state programs, the only program with a partial focus on tourism (Development of Culture and Tourism) has objectives that are indirectly related to the development of agritourism, namely the preservation and development of cultural and historical heritage. Within the framework of the program, a mere 2% of the total expenditure of 8.2 billion rubles has been allocated to “tourist” sections, with the Rostov region itself contributing only one-third of this amount (<https://www.donland.ru/documents/9750/>).

The 2024 competition for entrepreneurs in the region partially addressed priorities to the tourism industry, offering subsidies to expand hotel room capacity through glamping construction (as a means of accommodation, including at wineries). The regional project “Tourism and Hospitality Industry”, implemented in 2024 is designed to provide support for public initiatives and projects focused on the development of tourism infrastructure (not directly related to agritourism).

The issues of rural (and agri) tourism are not reflected in such important (for rural districts as areas of agritourism development) regional programs as:

- “Territorial planning and provision of affordable and comfortable housing”,
- “Environmental protection and environmental management”,
- “Regional Policy”.

Only the state program “Integrated Development of Rural Areas” identifies tourist facilities as a potential candidate for reconstruction. It is evident that there is a lack of focus on tourism, particularly in the context of agritourism, within the regional tourism management strategy. In the legislative sphere, the lack of agritourism in the system of institutional priorities means that its interests can only be taken into account through consultation. There is no concept of an integral agritourism zone. With regard to investment and infrastructure provision, the investment environment in the region is not yet aligned with the needs of agritourism.

The spatial dispersion of the locations make it challenging to consolidate resources for infrastructure investments. However, locations sponsored by major companies have the option of building their own infrastructure (Starozolotovskiy hamlet).

Despite the availability of designated tourist routes, demand for them may fluctuate. This may result in the cancellation of tours, as regular transportation is not specifically designed to provide service between agritourist locations.

The interaction between business and population in locations constitutes an essential part of the institutional field, characterized by complementarity (work for local residents). However, the main problem – the lack of staff in the tourism sector, which agritourist locations require – is not solved by the attraction of local staff.

In general, a number of inconsistencies can be identified between the institutional environment and the emerging (and prospective) nature of the development of agritourism in the region (Table 9).

Table 9. Institutional constraints to the development of agritourism in the Don Valley

Institutional area	Elements of institutional impediments	Reflection in the field of agritourism
Content of strategic and program documents of the region	Agritourism is not considered as an object of regulation and investment	The interests of the industry are only taken into account in an advisory form
Regulation of agritourism as an integral independent segment of the tourism market	Lack of adaptation of regulation for agritourism needs	The Don Valley is not regarded as a unified spatial area.
Conditions of rural infrastructure development (regional and municipal sphere)	Rural development programs are not focused on the needs of agritourism	Lack of investment opportunities for agritourist locations due to geographical distance from one another
Conditions for investment in agritourism activities (market sector)	The investment expenditures of the regional tourism program are constrained and largely unrelated to agritourism.	Small businesses do not have the investment to expand independently
Access to agritourism routes and destinations (regulation and market actors)	Prioritize the PR of agritourism events rather than locations	No resources to organize independent tourist flow
Interaction between business and population in agritourist locations	No incentives other than market-based	Spatial isolation of the main part of agrilocations (obstacle to attracting personnel)

Compiled according to results of research

In light of the identified challenges associated with agritourism specialization development in the Don Valley, it is possible to suggest a number of potential pathways for its transformation. These pathways should take into account the interests of both

the agritourism industry and the rural areas in which relevant projects are to be implemented (Table 10).

Table 10. Directions for amending the institutional sphere of agritourism regulation in the Don Valley

Institutional area	Directions for amending
Structure of tourism management bodies	Departmental integration of powers for agritourism development
Strategic guidelines of the authorities	Formation of strategic and conceptual approaches in the sphere of agritourism development in the region
Priorities for infrastructure investment and financing	Mainstreaming agritourism development into infrastructure development programs and investments in rural areas
Consideration of the neighborhood factor with the leading agritourist region of the Russian Federation (Krasnodar krai)	Interaction with agritourism development institutions in the Krasnodar krai

Compiled according to results of research

In order to facilitate the reorganization of the institutional environment in a manner that aligns with the needs of agritourism businesses, it is essential to consider the nature of the industry's key actors. These include:

1. Focusing regulation on small and medium-sized businesses as the basis of agritourist locations in the region.
2. Focusing on supporting the core activity of enogastronomic companies, which is the basis of their tourism appeal.

The success of these measures hinges on the coordinated actions of both formal institutions and businesses engaged in agritourism projects. Concurrently, the implementation of such projects in local communities has highlighted the importance of rural development, with the potential for such projects to act as catalysts for growth in these areas.

Discussion

Regions with previously relatively poorly developed tourism are areas of expansion of tourism supply in the context of growing demand. The tool for satisfying demand here is diversification of tourism supply, which requires an analysis of the process using system-structural and geographical approaches, as well as institutional analysis. The study offers a joint analysis of the geographical aspects of development of the agritourism industry and the institutional environment at the regional level in the context of creating a new tourism supply (agritourism).

The relevance of this analysis in the context of the regions of Russia where a new (agritourism) segment of the tourism market is being created is caused by the growth of domestic tourism demand and reaching the maximum capacity of seaside recreational ecosystems. In addition, the relevance of considering agritourism as a factor in reducing the environmental burden is consistent with previously expressed approaches (Dickson & Arcodia, 2010; Zhong, 2020).

The methods of spatial analysis, which have traditionally been used to examine the geography of industries, are relevant in the context of the emergence of new formats of

tourist and recreational development (in particular, the Don Valley). This is due to the ongoing transformation of approaches to the organization of tourism in regions.

The agritourism offerings in the Don Valley were selected as the basis for the analysis, which spanned the period from 2021 to 2024. This timeframe was chosen due to a notable shift in the approach to tourism development in Russia, with a particular focus on the growth of domestic tourism and the expansion of accommodation options, including the construction of glampings and the establishment of a national network of tourist routes.

The assessment of the geographical structure of agritourism development in the Don Valley comprises an assessment of the spatial accessibility of locations from the key areas of demand generation, the positions of such locations in terms of their potential for coverage by tourist flows. The positional assessment of agritourism locations confirms the previously made conclusion (Domi & Belletti, 2022) about the importance of analysing the factors of agritourism development (including the positional one) as a tool for rural development (and as a tool for development of the relevant policies).

Following an evaluation of the geographical remoteness and accessibility of agritourist locations, the Don Valley was initially zoned as an agritourist area. Additionally, each zone was qualitatively characterized based on a combination of positional and qualitative parameters of its constituent agritourist locations.

The principal issues were identified as a relative reduction in the accessibility of agritourist locations situated at a distance from the regional center (Rostov-on-Don and federal highways) to cater for local and transit tourist demand. Supplementing an institutional analysis with a spatial analysis enabled the identification of both the extent to which the region's tourism management institutions align with the emerging parameters of the agritourism industry in the Don Valley and the significant inconsistencies between the institutions and the needs of agritourism in relation to the goals of its transformation into a sustainable competitive advantage.

Compared to the previous analysis (Degtyaryova, 2023), a greater focus on agritourism has been achieved, and recommendations have been formulated for modernizing the institutional environment that has not received sufficient attention before. A pronounced problem area of the institutional environment for agritourism development in the Don Valley is the peripheral nature of tourism management authorities in the system of governing authorities, the absence of tourism as a priority in the region's strategic documents, and an insignificant share of funding for tourism development tasks in the regional budget. Thus, the weakness of the regional tourism management link is emphasized, which highlights differences from the experience of countries with more developed rural tourism (Liu et al., 2020), where the local government plays an effective role in tourism management, and the synergy of central and local authorities facilitates the rapid development of the industry.

In the context of closed external borders, building up the potential of the tourism industry can become a driver for development of the regional tourism sector. Agritourism can become a competitive advantage of the region and the basis for shaping a tourist brand for the region, which has not been formed today. The institutional analysis does not allow us to confirm the trend towards establishing the role of agritourism as a driver of growth of rural areas of the region (Kazmina et al., 2020), since this is only possible if the regional institutional environment for tourism development is modernized.

The geographical and institutional analysis of the formation of agritourism in the Don Valley enabled the identification of key regional problems and negative factors associated with agritourism formation. Additionally, it facilitated the assessment of potential avenues for optimizing institutions, which is a crucial aspect for the prospective advancement of agritourism in the emerging region of its development (the Don Valley). It is recommended that the results obtained be taken into account by regional authorities in the formulation of strategic planning documents for the development of the tourism industry and rural areas of the region, which should be identified as a key area for the implementation of relevant projects.

The method of integral assessment of geographical structure and institutional support in the context of agritourism development can be further adapted to address practical challenges related to the development and branding of territories.

Conclusions

The paper evaluated the geographical structure and institutional factors that have shaped the development of agritourism as a distinctive and innovative tourism specialisation in the Don Valley (Rostov region). This was achieved through a combination of spatial analysis and analysis of the institutional conditions that have facilitated the growth of agritourism in the region.

The analysis of spatial and institutional structure is a significant method of studying the geographical features of tourist areas, enabling the effective structuring of the spatial potential of individual industry segments. The structural and geographical analysis of the agritourist area of the Don Valley has enabled the first-ever zoning and qualitative characterization of its main zones.

The analysis of the institutional conditions pertaining to the development of agritourism in the region simultaneously corroborated the conclusion about the inconsistency of the trend of agritourism development and the institutional conditions of its development in the Don Valley. The following issues have been identified in the institutional field: the status of tourism management bodies is inconsistent with the prospects of the industry in the region, the agritourism is absent from the region's key strategies and programs, fragmented funding for tourism within broader programs. Moreover, there is a lack of investment in rural areas to develop its tourism and agritourism potential. Furthermore, there is inconsistency between the development priorities and the prevailing nature of business structures in agritourism of the Don Valley.

The analysis of the industry development parameters and related institutions enabled us to identify the principal issues and priority areas for the reform of institutional policy in the industry. The implementation of these reforms could facilitate the creation of a sustainable tourist brand for the region and provide a long-term sustainable competitive advantage in the tourism sector (agritourism).

The continuation of this study is the analysis of the experience of regions of the world with developed infrastructure of agritourism and wine tourism and developed industry institutions for the purpose of using of this experience in the Don Valley. In this context, the objects of analysis are both the experience of interaction between formal and informal institutions and the range of measures of state policy to support the industry.

Meanwhile, based on the approaches considered the future direction of research may be the study of the geography of agritourism and the natural potential of the territories of its localization in the Don Valley in order to form thereupon the concept of environmentally sound spatial development of agritourism. Also, the prospect of research is associated with inclusion of priorities for the development of agritourism in the policy and practice of development of rural areas, which are currently experiencing depopulation and need new development mechanisms.

Conflicts of Interest: The authors declare no conflict of interest.

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