

destinations : wellbeing tourism

detour 



IO2 – Wellbeing Tourism Destination Action Plan Slovenia

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1. Introduction

A *destination action plan* identifies the priority strategies and actions that, if implemented, will enhance the competitiveness of the region as a primary visitor destination. It provides a framework and direction for delivering new and improved tourism experiences across the region.

Taking care of our well-being is key to success for our good health. In Slovenia you will find interesting ways of pampering with raw materials and different products you might not have guessed could be used in such ways.

Slovenia is a small country with two million inhabitants on the sunny side of the Alps. Stretched between the Alps, the Mediterranean and the Pannonian plain, wellbeing and wellness have all possibilities to develop nicely.

While the North-East (alpine region) is mostly known for winter sports, nature trails and hiking, it is the North-east and Eastern Slovenia that stands for wellness. Typical for this Eastern part of Slovenia are Spa's, thermal resorts, tourist farms, numerous locations and opportunities for sports and recreation. Looking at the map of Slovenia and brochures, provided by the Slovene tourist board, one will however find more destinations located in the Western part of the country. Nevertheless we believe that a smaller number and thus more people-focused services give Eastern Slovenia a competitive advantage.

The vast diversity of 'different worlds' that Slovenia offers to a visitor is a huge strategic advantage when it comes to offering diverse destinations that a tourist can literally visit all in one day. Slovenia is the only European country that connects the Alps, the Mediterranean, the Karst and the Pannonian Plain. Concentrating on the Eastern part of Slovenia we enter a region which awards the passing visitor with romantic mosaic of plains, sun-kissed wine growing hills, rich historical heritage crisscrossed by thermal springs which contribute to health, relaxation, active holidays and people with exceptional hospitality that cook culinary delights with love.

Typical for this part of Slovenia, speaking in sports terms, are numerous hiking paths and cycling trails that can be accessed year-round; in the summer around the water, in the winter and other seasons in the woods.

Adding that in the 2019 survey by the World Economic Forum, Slovenia scored an average of 4.3 out of seven points based on assessments in 14 elements of competitiveness in four key categories - enabling environment, tourism policy and enabling conditions, infrastructure and natural and cultural resources; two years ago, it placed 41st among 136 countries. Slovenia also fared the best in environmental sustainability (20th), in natural resources (26th), in tourism infrastructure (27th) and in importance of tourism (33rd place). In the field of tourism policy and the state of conditions for development, Slovenia placed 18th, which the Slovenian Tourism Board (STO) mostly attributes to the growth in importance of tourism.

2. Objectives for the Wellbeing Tourism Sector

The Slovene Tourist Board advertises Slovenia as a place where you can relax in your own way.

When temperatures drop and the air starts nipping at your nose, you can escape to the warm embrace of Slovenia's thermal waters, saunas and high-quality wellness resorts, each marked by its own unique experience - from traditional beauty and health programmes to the one of a kind beer and honey wellness treatments. Enjoy the winter season with a relaxing family getaway, romantic pampering for two, or some well-deserved me-time.

Source: <https://www.slovenia.info/en/wellbeing-vacation-winter>

Slovenia's extensive wellness traditions owe its existence to the unspoiled nature, creating most beautiful paths to well-being. Slovenia is sure to become the favourite getaway to anybody who is looking for a relaxing escape where one can unwind and recharge.

Slovenia top outdoor experiences:

- **Hiking:** More than 15,000 km of mountain, themed, and walking trails and well-maintained hiking infrastructure invite you to explore and exercise (hiking in the hills, themed trails, hiking in the highlands, lowlands, winter hiking, climbing the mountains, via ferratas, top long-distance hiking trails over mountains and through valleys from the sea to the plains, many go through and across Slovenia).
- **Cycling:** A bicycle is the ideal choice for seeing our natural beauty, experiencing local atmosphere, and touring special historical and cultural features. Beautifully maintained, diverse cycling trails offer terrain for cycling enthusiasts of all kinds (tourists can choose between family cycling, road cycling, mountain biking, bike parks or trekking cycling).
- **Winter sports:** In the winter, when nature calms down and rests, it's time for some fun in the snow and on ice. Slovenians have had a long and rich tradition in many sports connected to the snow, cold, and ice. Alpine skiing and ski jumping are an important part of our identity. Who has never heard of ski flying in Planica, the Golden Fox race in Maribor, or the World Cup Alpine skiing races in Kranjska Gora? Our mountaineers, who train in the Slovenian mountains, have been among the world's best for decades. Virtually everyone does some kind of a winter sport recreationally and participates in popular winter hikes.
- **Water activities:** Tourists can swim in the sea, our many rivers, and lakes. After a long hike, they can find refreshment next to one of our many waterfalls. There are more than 300 of them. The most courageous can explore the underground water world in kayaks and scuba diving gear. They can lazily lounge on city beaches or have fun in water parks, go fishing and fly fishing, stand-up paddle-boarding, sailing. Our waters are our wealth!
- **Golf:** Golfers are welcome in Slovenia. And they love visiting. Because everything is so close in Slovenia, they can afford to play golf at a different course every day. These courses are located in idyllic landscapes – in the picturesque Alps, central Slovenia, or the Pannonian lowlands of Eastern Slovenia.
- **Thermal Pannonian Slovenia:** rolling hills, diverse and lush flora, trails that take you past fields, meadows, and through villages, where scarce locals greet visitors with a smile, vineyards cover the gentle hills, and the food is incredible. After a day packed with active experiences, spas and many kinds of medicinal waters await you.

While winter and summer used to be the busiest seasons, the strategic development plans are now focused on:

1. To grow awareness of Slovenia as a year-round wellbeing destination.
2. To increase the number of companies providing wellbeing experiences .
3. To increase the number of people with specific training in wellbeing tourism (upskillig).
4. Increase promotion of less known tourist destination that have so far received a limited number of guests (all in line with the sustainability paradigm of tourism)
5. Add the “well-being” aspect to the existing tourism products, related to the tourism forms that were well known and favourite in Eastern Slovenia before the pandemics.
6. Infrastructure that enables the person to be alone (hear the silence) and not in a hotel, where there are many people. Option: huts, (glam)vineyard cottages, tourist farms (authentic).
7. To redirect visitors from the Western to the Eastern side of Slovenia – thus relieve the already popular tourist spots (Bled, Ljubljana, Postojna and Škocjan caves,...) in order to prevent mass tourism.
8. To promote heritage tourism for the purpose of preserving the rich history of rural life and to educate the visitor about regional cultural peculiarities and differences.
9. To promote Slovenian eco tourist farms as an allround wellbeing experience, which combines activities in nature, pristine taste of home product products that are closely tied with generation passed folk culture and tradition

3. The Strengths and Challenges of, and Opportunities for the Wellbeing Tourism Sector

As the whole tourism sector in the region evolves, new challenges and opportunities are being unveiled and Wellbeing tourism, will again have a chance to show its full potential that can benefit from the rich resources of thermal springs, tourist farms offering healthy, home-grown food and many opportunities for sports activities in all seasons.

a) *Strengths*

Generally speaking, Eastern Slovenia offers numerous natural resources: mountains, forests, SPA's and thermal resorts, less-known towns and places that are safer, hospitality of the local population, 4 seasons, European region of gastronomy, rural areas...

- **Natural resources diversity**, that brings great flexibility to experience designers and product developers, also facilitating the destination positioning in different market segments.
- **Slovenian natural health/thermal resorts**. Thermalism has been one strong product in the Eastern Slovenia tourism, offering unique experiences both for therapeutic and leisure purposes. All year-round products focusing on health, preventive therapies, wellness, relaxation, and thermal spa adventures for visitors of all ages.
- **Lush natural diversity** which contributes both for leisure or active holidays.

- **Very high standards of safety & security.** The Global Peace Report 2020 has ranked Slovenia as the 11th safest country in the world.
- **Rich historical heritage.** Many Slovenian castles have been transformed into hotels, and their unique offer - romantic gardens, excellent cuisine and castle walls whispering stories from long ago serve as a superb backdrop for an active holiday inspired by romance and history.
- **Green** in all shades, a few kilometres away, and one finds himself in a different environment.
- **Rich and unexplored cultural resources.** Slovenia's hidden gems are its castles that offer many things: overnight accommodation, historical markets, wild history...
- **4 seasons:** a special treat to benefit from all four seasons on a relatively small territory. This gives you a reason to visit often, at different times, and experience the same place differently all the time.
- **Welcoming people.** Slovenian population is known to welcome people with open arms (in English) and make them feel at home.
- **Peaceful and tranquil rural settings** that share the landscape with woods, mountains and the sea, housing a deeply relaxing ambience for mindful moments.
- **Gastronomy.** The culinary philosophy of Eastern Slovenia is based on the principle of 'garden to table' and this is reflected in the close relationships between chefs and local producers, as well as the connections between Slovenian landscapes and traditional culinary experiences. Slovenia is also the European Region of Gastronomy in 2021.
- **Rich wine culture.** From the oldest vine in the world (more than 450 years), located in Maribor, the Podravje wine-growing area, which has wine-growing locations that are considered to be among the best 4% in the world to 2400 years of wine-making tradition in the wine-growing country of the Ljutomer-Ormož Hills, Eastern Slovenia offers a rich region of the best wines and oldest wine cellars.
- **High sustainability standards.** Slovenia with its Slovenia green brand have development model that is deeply aligned with sustainability, which grants the destination a strong brand image and high attractiveness.
- **Peaceful and tranquil rural settings** that share the landscape with woods, mountains, sun-kissed vineyards housing a deeply relaxing ambience for mindful moments.
- **Heritage preservation and nature conservation.** Slovenia is well-known for its green label – clean nature, environmental quality and conservation which provides the means for creating a “green” image of the destination.
- **Green Scheme of Slovenian tourism** brings together all efforts directed towards the sustainable development of tourism in Slovenia; offers tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours; and promotes these green endeavours through the Slovenia Green brand.
- **Small size of the country.** Its small size means that even the remote, rural parts of the country are easily accessible from the country's urban centers. tourists can stay in the large cities, such as Maribor, for the duration of their visit yet still easily enjoy all the secluded, natural landscapes and attractions Eastern Slovenia has to offer.

- **Multilingualism.** 92 percent of Slovenians are at least bilingual, and an impressive 67 percent are at least trilingual. And, not only do many Slovenians speak foreign languages but also they speak the right foreign languages. Fifty-nine percent of Slovenians speak English, and 42 percent speak German.
- **Diverse biking trails** which run through hills, plains, forests, vineyards, historical cities, besides UNESCO's biosphere reserves The Mura River,... Visitors can decide on family cycling on level terrain, while more enthusiastic bikers can try to conquer slopes which will reward them with beautiful views.
- **Countryside tourism.** All year-round tourism based on what tourist farms offer, small providers and vineyard cottages, and authentic rural experience.

b) Challenges

The biggest challenge in Slovenia is the large focus on wellness and medical tourism, lack of skilled staff who would understand the importance of wellbeing tourism and consequently the quality of services in the field of wellbeing. Slovenia therefore also lacks the integral products, based on wellbeing.

- **Increase the availability of qualified human resources**, namely in wellbeing, to be able to answer to the companies' need, as well as to offer new services, experiences and products and to cater to higher-end market segments.
- **Increase the quality of services** : boutique, 5* tourism, high levels of service. It is important to address this need to improve the tourists' experience, the destination's competitiveness and its perceived value
- **Reduce seasonality -Year-round tourism** (every season, irrespective of the weather), not just winter and summer tourism.
- **Investments in tourism infrastructure** (purchasing sports equipment, such as e-bikes, golf equipment,...)
- **Increase the destination/brand awareness** in regards to wellbeing. During that process, it is also vital to reinforce the wellbeing identity of the brand to entice more tourists, confer new grounds to the brand and promote the wellbeing tourism sector.
- **Go beyond thermalism.** Leave the excessive focus on SPAs, medical tourism and thermalism and explore new possibilities for its development. Crossing over with other products and stimulating new offerings may bring great benefits for the whole tourism sector.
- **Promote creating products of higher added value.** The key objectives of the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism are to increase recognisability and promote Slovenia as a green, active and healthy destination for 5-star boutique experiences, increase an added value of tourism and income from the export of travels, focus on demanding visitors seeking high-quality diverse and active experiences, tranquillity and personal benefits, form innovative products of higher added value based on sustainable development, deseasonalisation, geographical dispersion of tourist flows, provision of suitable and motivated

staff, improvement of flight connections and accessibility, enhanced investments and modernisation of the infrastructure.

- **Increase the added value** in what regards wellbeing. As a tourist destination, Slovenia still need to increase their awareness in international markets. During that process, it is also vital to present Slovenia as a destination for 5-star experiences, reinforced with the wellbeing identity of the brand which will increase added value and income from the export of travel.
- **Increase sustainability and green context.** Sustainable and responsible development is the pillar of Slovenian tourism, and all its stakeholders have committed themselves to these ideals. They provide support for the preservation and protection of natural and cultural assets and heritage, and for responsible and sustainable tourism revaluation.

c) What are the opportunities?

Although the Covid-19 pandemic has brought serious challenges and unexpected difficulties to tourism development in general, facing the future with optimism is vital. If people have learnt anything from the current crisis, it is hopefully not to return to mass tourism but rather wanting to spend their free time actively connected with nature.

Slovenia furthermore has one national park, four UNESCO World Heritage sites, three biosphere reserves and two UNESCO Geoparks, all of which could be used to emphasise the wellbeing aspect of all-year round tourism potential. Summarizing opportunities:

- **Broadening the scope of wellbeing tourism** will certainly bring a new understanding of the potential that the Slovenia offer to cater for some of the current trends and market demands.
- **Wellbeing in nature** is something that is already on the Slovene tourism agenda (<https://slovenia-activities.com/>)
- **Bundling wellbeing activities with nature-based products** is part of the national strategy for tourism development. It has a huge potential for creating rich experiences.
- **Rural tourism and agritourism** have huge potential in Slovenia and should be further explored and promoted.
- **Broadening the scope of wellbeing tourism** will certainly bring a new understanding of the potential that Slovenia has to cater for some of the current trends and market demands.
- **Accommodation in nature** is something that is rising in demand. In Slovenia, nature based accommodation (hotel, thermal spa, tourist farms, glamping) are increasingly being built in this direction with the addition of environmental certificates for high quality accommodation experience.
- **Countryside tourism** in Slovenia offers very relaxing but fun and enjoyable experiences due to the characteristics of the territory and the importance of agriculture in the regional economy.
- **Post-pandemic search for relaxation and wellbeing** is expected to boost the search for off-the-beaten-path destinations with low tourist density, that provide a soothing place to recharge, celebrate life and find renewed purpose and motivation - something that Eastern Slovenia can easily offer.

- **Slow adventure and slow travel** are on the rise and are expected to increase as part of the “revenge travel” trend. The slow travel mood that Eastern Slovenia provides - with peaceful rural settings, tranquil nature, well-balanced rhythm and welcoming people - may well be a strong differentiating factor for the region.
- **Brand development.** Even though Slovenia has strategically been branded as a “green, active, healthy” destination, leveraging some wellbeing features, there is much to be done to increase the awareness of the destination. Consolidating the wellbeing essence of the brand is an opportunity that should not be overlooked in the current paradigm.
- **Collaboration.** There is still much to be done in what regards collaboration between companies and other tourism stakeholders in Slovenia, especially in the wellbeing sector. As tourism is being reactivated globally, there is a new chance for that to happen and to create new partnerships and synergies.
- **Low prices.** Certain key products and services are significantly less expensive than in many other European destinations. Lonely Planet, the largest travel guide publisher in the world, included Slovenia in its “Best Value Destinations” article for 2013.

4. What are the priority actions?

Strategic development vision of Slovenia, as presented by the Slovene Tourist Board (https://www.slovenia.info/uploads/dokumenti/kljuni_dokumenti/strategija_turizem_koncno_9.10.2017.pdf) see Slovenia as a green boutique global destination for demanding visitors, looking for diverse and outdoor experiences, peace and personal benefits.

The vision, which provides us with priorities, is composed of numerous market-oriented key elements:

- **Green, boutique destination:** emphasis on Slovene green experience at all consumer levels, high quality of experiences for the end user and the feeling of “boutiqueness” while vacationing in Slovenia.
- **Global destination:** globally known tourist offer and experiences. High value of the brand: national and tourist brand.
- **A destination for a demanding traveller:** tourists Tourists with selected taste - recognizability of the uniqueness of experiences - green, active, healthy. More demanding guests looking for a diverse and satisfying experience other than the mass tourism and unsustainable concepts.
- **Destination for a traveller seeking diverse and active experiences:** diverse experiences: from passive relaxation, exploration, viewing tourist attractions, to active holidays, adrenaline challenges and changed personalities.
- **Destination for a traveller seeking peace and personal development:** a feeling of inner peace, revived holiday satisfaction, emphasis on peaceful environment, enjoying breathtaking views, scenery, preserved nature, cultural beauties, mountain peaks, lakes, rivers, shorts,... By spending a holiday in Slovenia the visitor feels the benefits at the personal level:

satisfaction, fulfillment, self-discovery, inspiration, relaxation, well-being, and new insights.

Feedback from the “field” however also suggests other topics:

- **Low prices.** Certain key products and services are significantly less expensive than in many other European destinations. Lonely Planet, the largest travel guide publisher in the world, included Slovenia in its “Best Value Destinations” article for 2013.
- **Promotion of connections at the level of destinations,**
- **Integral tourist products** of well-being
- **Revising and updating existing products** to include well-being
- **Increasing the awareness** of tourists about well-being tourism as a very important form of tourism through targeted marketing activities
- **Sustainability paradigm** and well-being - connecting the two components - the well-being of the environment and my well-being
- **Well-being tourism as a bridge to the return of tourists** - a priority post-crown form of tourism that attracts tourists to start traveling again - the task of marketing tourist destinations

Action	Priority Level (high / medium / low)	Whose responsibility
1. Pricing policy	LOW	Individual providers
2. Promotion at the level of destinations	High	DMOs, Slovene Tourist Board
3. Integral Tourist Products	Medium	Slovene Tourist Board in connection with individual providers
4. Adjust existing products with well-being note	Medium	Individual providers
5. Create wellbeing training programs for continuous improvement, development of new skills and professional reorientation.	Low	Educators (vocational colleges with B2B Training centres)
6. Foster joint projects between companies, research centres and other tourism-related organizations to develop pilot projects and programs to diversify wellbeing tourism offerings.	Medium	DMOs, Slovene Tourist Board, Educators)
7. Experiences in nature	Low	Slovene Tourist Board
8. Support the development of a range of products and experiences to increase the diversification of wellbeing activities.	Medium	Slovene Tourist Board
9. Countryside tourism (outside the beaten track)	Medium	Slovene Tourist Board, DMOs
10. Updating standards and specialisations in vocational education	High	Ministry of Education, CPI, vocational colleges
11. Strengthening programmes for middle management	Medium	Ministry of Education, Universities

Action	Priority Level (high / medium / low)	Whose responsibility
12. Promotion of vocational education	High	Chamber of Commerce
13. Setting up a model for integration of tourism, agriculture, crafts, designs and creative activities	Medium	Ministry of Economy, Chamber of Commerce,
14. Transformation of Slovenia's marketing approach and promotion of key products	High	Slovene Tourist Board
15. Digital Agenda – promotion of tourism	High	Slovene Tourist Board

In addition to that, the Slovene Tourism board seeks to undertake the following revisions of the existing tourism offer – Promotion of products for key markets, according to priority areas :

PROMOTION OF PRODUCTS FOR KEY MARKETS – PRIORITY LEVEL		I PRIMARY II SECONDARY III TERTIARY							
		AUSTRIA	GERMANY	ITALY	THE NEATHER-LANDS	GB	CROATIA	RUSSIA	FRANCE
CONSIDERED IN THE MARKETING PLAN FOR A MACRODESTINATION	1. HOLIDAYS IN THE MOUNTAINS & OUTDOOR	II	I	I	I	I	I	III	II
	1. HEALTH & WELL-BEING	I	II	I	III	III	I	I	III
	1. BUSINESS MEETINGS	UNDER THE RESPONSIBILITY OF THE SLOVENIAN CONVENTION BUREAU							
	2. GASTRONOMY	I	I	I	II	I	II	I	I
	2. EXPERIENCES IN NATURE	I	I	II	I	II	II		II
	2. CULTURE	II	II	II	II	II	II	II	I
	2. TOURING	II	II	III		II		II	I
	3. SUN & SEA	II	III	II	II	III		I	III
	3. SPORTS TOURISM	III	III	III			III		
	3. COUNTRYSIDE TOURISM	III	III	III			III		

Source: https://www.slovenia.info/uploads/publikacije/the_2017-2021_strategy_for_the_sustainable_growth_of_slovenian_tourism_eng_web.pdf, pg. 21

Based on the above, one can see that the action plan for further strategic development of the wellbeing sector includes the focus on the German-speaking and Italian market (driving distance, radius of 500km), holidays and outdoor (mountain) tourist opportunities, gastronomy and experiences in nature.

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