

destinations : wellbeing tourism

detour 



IO2 – Creating a Community of Destination Audit Slovenia

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1 Introduction

I feel Slovenia. My way.

This slogan perfectly suits the image Slovenia shows to the outside world, promoting itself as an exclusive, boutique tourist destination. The old Slovene proverb says “Dober glas seže v deveto slovensko vas” (literal translation: a good opinion reaches the 9th village) – which translates, more or less, as “Good news travels fast”. For several years until the end of 2019, Slovenia has seen exceptionally high growth in the number of foreign tourists, tourist revenues and number of overnight stays. Tourists value Slovenia for its superb natural beauty, unspoilt nature and excellent boutique range of experiences, both culinary and non-culinary. Above all, they feel safe and welcome.

Well-being tourism in Slovenia is mostly understood as a type of tourism that includes tourism activities whose main purpose is to contribute to the physical, mental and cognitive health of visitors. The first association for well-being tourism supply in Slovenian context include wellness programs (various types of pampering, yoga and meditation, sports activities and fitness, beauty treatments, spiritual exercises, nutrition and detoxification programs, thalassotherapy, etc.) implemented by various institutions (spas, thermal centres, hotels and apartment complexes, festivals, cruise organizers). As it was previously proposed, in Slovenian contexts terms “wellness” and “well-being” are used interchangeably. Well-being tourism is therefore equalized with wellness tourism, which is definitely not the same, because Slovenia as a tourist destination offers other components which could be incorporated in future well-being tourism development proposed by Smith and Diekmann (2017), such as: education, hedonism, environmentally-friendly experiences, rural environment and different types of agritourism activities as also city wellness (www.slovenia.info).

2 Thoughts on Wellbeing Tourism

In Slovenia, well-being is almost taken for granted because of the abundant beauty of nature. Even the slogan says: Green. Active. Healthy. It’s therefore difficult to put all thoughts about wellbeing on paper.

Some publications start with food: Innovative range of yoghurts, first high-protein ice lollies and hemp-seed toast. Healthy and natural are the guiding principles behind the Slovenian food industry, which keeps a keen eye on food trends and offers consumers only the very best. We place great emphasis on locally produced ingredients of verified quality, but also on using new approaches to develop environment-friendly packaging.

Slovenia is also continuously engaged in introducing new developments in tourism, with guests opting in increasing numbers for comprehensive “well-being” products and services. Guests can take advantage of a relaxation park comprising the four basic elements that help to improve well-being, rejuvenate their senses at a spa, or set out to explore one of the most beautiful caves in the world. A visit to a high-mountain pasture, a unique example of cultural and architectural heritage, also makes for an unforgettable experience. And that can be done **all in one day**.

The principle of “a healthy mind in a healthy body” is something common to all the activities and experiences described above. 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.



Source: <https://www.slovenia.info/sl>

Unique and authentic experiences that one can discover in Slovenia is something tourists won't find anywhere else.

3 The regional context

3.1 Slovenia as the land of health

Healthy waters are the stories of Slovenian natural spas. Stories of beneficial thermal waters and other natural healing resources used for health and well-being in Slovenia for centuries. And of people that have always been inspired by them for healthy and good living. (Healthy waters; Slovene natural spas. https://www.slovenia.info/uploads/publikacije/en/SSNZ_katalog_EN_f3a_pub.pdf).

When in Slovenia one mentions wellness, one thinks of Slovenian Spas. Water, climate and other natural healing resources are the core of the 14 certified Slovenian natural spas. In very diverse regions of Slovenia, natural resources, centuries-old traditions of treatment and the latest medical approaches are combined. Relaxation in attractive thermal pool complexes and top offers of pampering and activities for an integrated approach to the balance between body and mind are complemented with diverse activities in green nature.

3.2 The wellbeing market

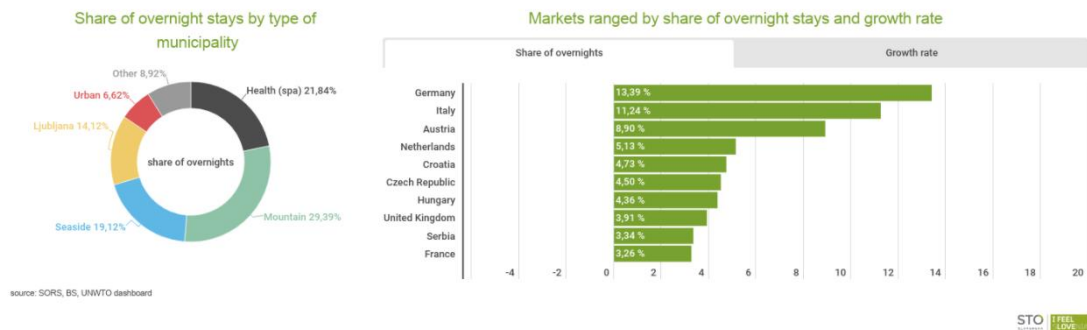


Figure: Slovene Natural Spas

(https://www.slovenia.info/uploads/publikacije/en/SSNZ_katalog_EN_f3a_pub.pdf)

Slovenian tourism in 2020 was heavily affected by Covid epidemics. This drop is nicely shown in the below two figures: -50% in arrivals and -41% in overnights.

Slovenian tourism in 2019



SLOVENIAN TOURISM IN 2020

Marked by the outbreak of COVID-19



TOTAL ARRIVALS
3,06 mio
-50,8 %

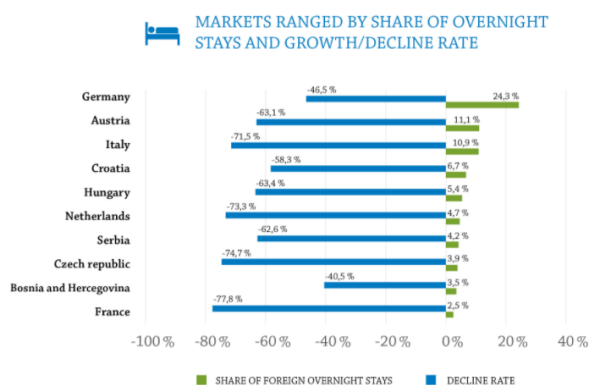
1,21 mio FOREIGN -74,1 %
1,84 mio DOMESTIC +21,0 %



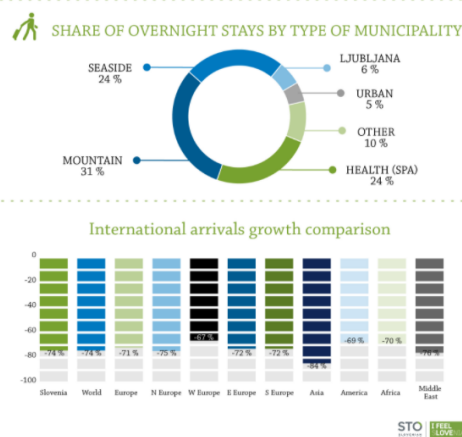
TOTAL OVERNIGHT STAYS
9,20 mio
-41,7 %

3,35 mio FOREIGN -70,5 %
5,85 mio DOMESTIC +32,8 %

TOURISM EXPORT
1,05 bil EUR
- 61,8 %



Source: Bank of Slovenia, SORS, UNWTO, 2021



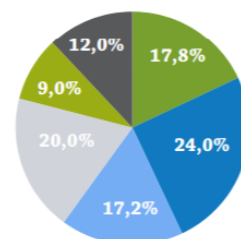
Source: <https://www.slovenia.info/en/business/research-and-analysis/tourism-in-numbers>

Since we believe in huge improvement once the Covid pandemics is over, the wellbeing situation will be reflected on numbers prior to March 2020 which show the real potential of the wellness and wellbeing market in Slovenia.

The example of spring months 2019 (usually the beginning of the season that is an indication for the summer) shows that the Health&Spa regions comprise almost 20% of all tourist arrivals.

Tourist arrivals by type of municipality

Type of municipality	March	April	May	Total
Health (spa)	77.709	78.968	74.342	231.019
Mountain	73.547	103.487	133.788	310.822
Seaside	57.527	82.293	82.787	222.607
Ljubljana	63.611	96.203	99.016	258.830
Urban	32.442	38.926	45.543	116.911
Other	36.344	53.613	64.466	154.423



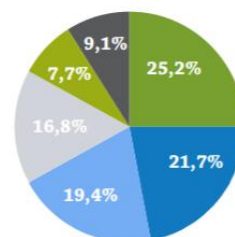
● Health (spa) ● Mountain ● Seaside ● Ljubljana ● Urban ● Other

Source: https://www.slovenia.info/uploads/dokumenti/tvs/2019/tourism_in_numbers_2019.pdf

The number of overnights, however, shows an even higher percentage, meaning that guests spend on average more nights in health&spa establishments than in other accommodation facilities (other regions).

Number of overnight stays by type of municipality

Type of municipality	March	April	May	Total
Health (spa)	243823	263961	254437	762.221
Mountain	176675	207282	271785	655.742
Seaside	146359	223621	216335	586.315
Ljubljana	123148	184702	199581	507.431
Urban	67114	80318	87407	234.839
Other	68084	95237	110486	273.807



● Health (spa) ● Mountain ● Seaside ● Ljubljana ● Urban ● Other

Source: https://www.slovenia.info/uploads/dokumenti/tvs/2019/tourism_in_numbers_2019.pdf

The summer months show an equal share of Spa's and coastal area, taking over 2/3 of the whole arrivals yet a small share off overnights.



2018	2.467.441	Growth +7,4%
2019	2.650.573	

Arrivals June-August



2018	6.938.041	Growth +2,7%
2019	7.124.480	

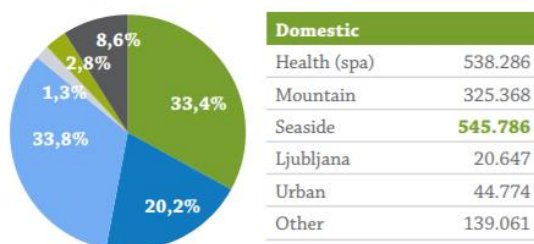
Overnight stays June-August

Consumption of domestic and foreign tourists

Domestic	38 EUR/day
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Data from the Survey on Tourism Travels of Domestic Population, 3rd quarter (July - September)

Overnight stays of domestic tourists



● Health (spa)

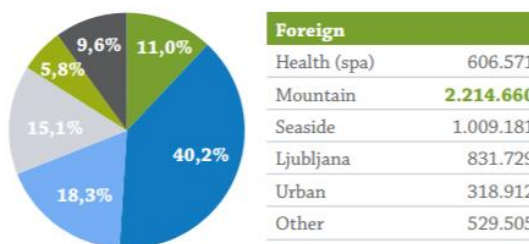
● Mountain

● Seaside

Foreign	97 EUR/day
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Data from the Survey on Foreign Tourists, July - August

Overnight stays of foreign tourists



● Ljubljana

● Urban

● Other

Source: https://www.slovenia.info/uploads/dokumenti/tvs/2019/tourism_in_numbers_2019.pdf

Main foreign markets for Slovenia are the neighbouring countries Austria and Italy, followed by the Germans, Dutch, Serbian and Russian tourists.

Slovene Natural Spa's have a common approach to advertising, focusing on the following areas:

- 1) **HEALTH** (we help you to be healthy): Top medical centres with the latest diagnostic and other equipment operate in certified spas, in which renowned specialists provide top diagnostics, treatment and rehabilitation.
- 2) **PREVENTION** (power of nature for health and vitality): medical wellness programmes, comprehensive programmes for body and soul, massages, baths, weight loss programmes, anti-stress therapies, programmes for managers,...)
- 3) **THERMAL BREAK** (active holidays for families and for everyone who enjoys relaxing holidays): numerous water parks, water fun and active lifestyle.
- 4) **SELFNESS** (for a more balanced and fuller life): Quiet, unique locations and a relaxing natural environment, refined with the power of natural healing resources. Physical activities and relaxation.

Wellbeing events translate into destination adventures. Attached are a few examples in various wellbeing regions of Slovenia.

DOBRNA THERMAL SPA	ZREČE	THERMANA LAŠKO
<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → Trip to Zlati grič in an idyllic wine-growing region. → Walk in the seven-hectare Mozirski gaj Flower Park. → Local delicacies at nearby tourist farms. → Follow the underground paths of miners in the Coal Mining Museum in Velenje. → Eco-Museum of the Hop-Growing and Brewing Industry in Žalec. → Velenje Museum at Velenje Castle, one of the most beautiful castles in Slovenia. → Trip to Logarska dolina, known as one of the most beautiful valleys in the Alpine area. 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → Unique Lovrenc Lakes, Black Lake, Šumik virgin forest and prehistoric Brinjeva gora. → Skomarje, the highest altitude settlement in Slovenia, with a typical Pohorje house and Memorial Room dedicated to the poet Jurij Vodovnik. → The Ošlak Forge, the oldest preserved forge in Slovenia. → The Žiže Carthusian Monastery in the hidden valley of Saint Janez Krstnik. → Cultural Centre of European Space Technologies (KSEVT). 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → The spa is part of Laško, a European Destination of Excellence (EDEN) for accessible tourism. → Internationally known Beer and Flowers Festival in July. → Tour of Laško Brewery with tasting. → Taste the honey stories by visiting a honey seller to see the making of gingerbread hearts. → Visit to Celje Castle and take a Celje city tour. → The Celje Hut – adrenaline park, and skiing in winter. → The Monastery of Carthusian Monks in Jurklošter reveals their lifestyle. → Tour of the Polhova jama Pit, a forgotten lead and mercury mine. → Visit to nearby tourist farms and traditional cuisine tasting.
LENDAVA THERMAL SPA	MORAVSKE TOPLICE	TERME OLIMIA
<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → Cultural and historical heritage (Jewish synagogue, Church of St. Catherine, castle, exhibition "Citizenship, Typography and Umbrella Manufacturing"). → Through three countries in one day (guided biking trips). → Bukovniško Lake with energy points and Ivan's Spring with healing water to improve eyesight. → Trip to Lendava hills and seeing the vintage in autumn. → Mummy of soldier Hajdik who defended Lendava from Turkish invasions. → Bukovniško Lake Adventure Park. → Permaculture incubator in Čentiba village. → Visits to Hungary and Croatia. 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → European stork village Velika Polana: come to see where the storks live. → Island of Love, an island on the Mura river. → Traditional Pannonian village. → Ocean Orchid plantation where orchids grow on thermal water. → Visit the past with Burjaši men on the Mura river. → See the making of Prekmurje pumpkinseed oil. → Bukovniško Lake with energy points and Ivan's Spring with healing water to improve your eyesight. → Bukovniško Lake Adventure Park. → Vulkanija Adventure Park: learn how volcanoes erupt. → The trip "Prekmurje, the land of idyllic cuisine and friendly people" is the best way to experience it all. 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → The third oldest pharmacy in Europe in Olimje Monastery. → Syncerus Chocolate Boutique. → Nine-fairway A-Golf. → Jelenov greben guesthouse, many wineries, home brewery, tourist farms. → Witch's Hut – land of fairytales and fantasy. → Podsreda Castle. → Rogatec Open-Air Museum → Cycling and walking trails.
PTUJ THERMAL SPA	RADENCI HEALTH RESORT	ROGAŠKA
<p>Adventures</p> <p>DOŽIVETJA V DESTINACIJI</p> <ul style="list-style-type: none"> → Historical city of Ptuj in the direct vicinity. → Visit to the oldest Slovenian wine cellar and the oldest grape vine. → European Centre of Mittraism. → Puch Museum for oldtimer enthusiasts. → Visit the ruins of Vurberk Castle and take a walk to its energy point. → Fairytale forest of Little Red Riding Hood. → Jeruzalem and Haloze wine roads. → Kurentovanje – the largest Shrovetide Carnival in Slovenia. → Roman games take you 2000 years back to the past. 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → Visit to the Radenska mineral water bottling plant. → Tasting of pumpkinseed oil, Prekija ham and local wines of the Jeruzalem wine region. → Tasting of Radgona sparkling wine in Radgona klet wine cellar. → Goričko Nature Park → Apiculture Museum in Krapje. → Go down the Mura river. → Cross-border treasure hunt on a bike. → Bukovniško Lake Adventure Park. → Visit to the Garden of Memories and Friendship in Petanjci. → Čebelji gradič eco tourist farm. → Three hearts marathon in May – running for the heart. 	<p>DESTINATION ADVENTURES</p> <ul style="list-style-type: none"> → Superb health resort park with a promenade and nice walking paths invite you into nature. → Steklarna Rogaska – visit the glass factory, tourist path. → Afrodita Cosmetics – a cosmetics producer, the leading Slovenian house of beauty. → Ana's Mansion – five museum collections about the rich history of Rogaska Slatina. → Cactus collection – over 7000 stunning cacti from all over the world.

Source: https://www.slovenia.info/uploads/dokumenti/tvs/2019/tourism_in_numbers_2019.pdf

There are many more destinations, but since the focus is rather regional, only the North-Eastern part of Slovenia was presented in the above list.

3.3 Understanding barriers and enablers

The main challenges identified for the sector are similar to ones in other countries: wages in hotels and catering far below the national average, high labour turnover, seasonality, etc. It seems that there is a higher appreciation of formal qualifications by employers in the sector. Skill requirements are personal and social skills, technological innovation, computer skills and information technologies and multiskilling (combination of skills from different qualifications).

Two most important aspects are qualification and flexibility. Flexibility of workers in the sector is seen by employers as a personal quality rather than a skill to which training provision can contribute. Furthermore, the lower the qualification, the higher mobility is expected. The demands placed on employees in the tourism sector are the same as those expected from professionals. Yet, remuneration does not match that for professionals.

Slovenia furthermore deals with a high number of seasonal workers in hospitality, coming from former Yugoslav republics with little if no knowledge of Slovene language. Hospitality and friendliness do not make up for the missing communication skills needed when addressing domestic guests.

3.4 Relevant strategies and policies

In the document *“Strategy for the sustainable growth of Slovenian tourism for 2017-2021 key emphases”* adopted by the Government of the Republic of Slovenia, words wellness or well/being are used 10/times.

In macro destination Mediterranean Slovenia **HEALTH & WELL/BEING** is proposed as a key product. This is “an all year/round product focusing on wellness, relaxation, selfness/mindfulness programmes and preventive therapies using natural therapeutic elements combined with the Mediterranean climate, speleotherapy, etc.”.

In macro destination Alpine Slovenia key product **HOLIDAYS IN THE MOUNTAINS** includes wellness and relaxation beside all the other components, such as outdoor adventures and activities.

In macro destination Thermal Pannonian Slovenia **HEALTH & WELL/BEING** is one of the key products and it includes “an all year/round product focusing on health, preventive therapies, wellness, relaxation, and thermal spa adventures for visitors of all ages”.

Health & Well/Being is therefore identified as one of ten leading (primary) tourism product in proposed macro destinations. It is also identified as one of three the most important products in terms of their impact on revenues and image which needs promotional support, active product development and management on the national level. Key markets for the promotion of this product are primary tourists from Austria, Italy, Croatia and Russia, secondary tourists from Germany and tertiary tourists from the Netherlands, France and the Great Britain (www.gov.si).

3.5 How regional development agencies support business startups

In order to encourage the development of tourism products and services of small and medium-sized enterprises to penetrate the global market, the Ministry of Economic Development and Technology co-finance the promotion of the development and promotion of integrated tourism products (www.gov.si).

In Slovenia, we are also focused on promoting the competitiveness of small and medium-sized enterprises in the field of tourism by improving measures for the use of renewable energy sources and reducing the use of energy and substances. For this purpose, the Ministry of Economic Development and Technology co-finance projects for the introduction of material and energy efficiency measures or the use of renewable energy sources in micro, small and medium-sized enterprises in the field of tourism (<https://www.gov.si/zbirke/javne-objave/podpora-mikro-malim-in-srednje-velikim-podjetjem-s-podrocja-turizma-za-povecanje-snovne-in-energetske-ucinkovitosti>).

With the aim of encouraging the innovation of companies with higher added value and a new knowledge-based investment cycle, small and medium-sized tourism companies can obtain a loan with a favorable interest rate and longer repayment terms. Within the program Financing of investments for sustainable growth of Slovenian tourism, offered by Slovenska izvozna in razvojna banka, d. d. - SID Bank, the company can obtain a loan worth up to 20 million euros with a maturity of up to 30 years and a moratorium on repayment of principal up to 5 years. The company can use the loan to finance investment projects in the field of accommodation facilities, sports infrastructure, entertainment infrastructure, cultural infrastructure, cable cars, marinas or tourist resorts. The loan can be obtained by the company: who has at least 2 employees in the last financial year, operating for at least 2 business years, whose investment is carried out in Slovenia and must be completed within five years after the approval of the loan and whose own participation in the investment is 15% of the total costs (<https://www.sid.si/mala-srednja-podjetja/financiranje-nalozb-za-trajnostno-rast-slovenskega-turizma-turizem-1>).

3.6 SWOT analysis

Wellness offer in Slovenia is based mostly on services, provided in wellness and Spa centres and resorts.

STRENGTHS	WEAKNESSES
Long tradition of Slovene natural Spa's Staff with great knowledge and competences especially in classical medicine Natural products and resources Competitiveness vs. other countries Wide variety of health – curative programmes importance of thermal healing methods	Too strong emphasis on medical wellness and rehabilitation Huge heterogeneity of guests considering the reason of their stay. The same approach to addressing medical tourists and wellness tourists
OPPORTUNITIES	THREATS
Connect the classical medicine with complementary / integrative medicine	Too strong emphasis on classical medicine (medical tourism) and no willingness to cooperate with integrative medicine