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EUROPEAN REGION OF GASTRONOMY
AWARDED 2021

TASTE SLOVENIA
ACTION PLAN FOR THE
DEVELOPMENT AND
MARKETING OF
GASTRONOMY TOURISM
2019 - 2023

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Action Plan

TASTE SLOVENIA

came into existence in order to identify the key measures and initiatives necessary for Slovenia to be positioned around the world as a unique boutique gastronomic destination. Based on its excellent natural conditions and the potential of the market, Slovenia will be properly positioned under the Taste Slovenia brand in terms of competition and it will find its market niche.



A close-up photograph of a hand holding a branch of raspberries. The raspberries are bright red and some are still on the green stems with leaves. Below the hand, a dark blue ceramic bowl is filled with fresh raspberries. The background is a soft-focus green, suggesting a garden or field.

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The product range of Slovenian gastronomy is built on unique 5-star experiences which successfully distinguish Slovenia from other destinations. We are recognised as a destination that offers experiences differing from mass tourism. Our product range is developed for a demanding tourist who is prepared to pay more for his/her gastronomic experiences.

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Action Plan TASTE SLOVENIA

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Drawing up of the Action Plan for the Development and Marketing of Slovenia's
Gastronomy 2019–2023

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Ljubljana, August–November 2018

exceptional + *spectacular* + *sustainable*
individuals + *environment* + *production* =

UNIQUE EXPERIENCE

of Slovenian gastronomy





Contents

TASTE SLOVENIA

9

Introductory summary

11

Bases

19

Main strategic areas

Regulatory framework – 21

Trademarks and quality evaluation in gastronomy – 23

Promotion of increasing quality – 25

Education – 27

Marketing – 29

43

Organisational framework

46

Strategic priorities overview

48

Evaluation

49

Work methodology

52

*Structure and size of
gastronomy tourism market*

⋮ Appendix: ⋮

A photograph of a man and a woman standing in front of a restaurant entrance. The man is wearing a light blue shirt and white trousers, and the woman is wearing a yellow and black patterned dress. They are standing on a striped mat in front of a dark wooden door. To the left of the door is a white sign with the letters 'JRE' in a serif font. Above the door is a balcony with a black metal railing and some plants. To the right of the door is a potted tree with red leaves. The building has a reddish-brown facade. The text is overlaid on a white rectangular background on the left side of the image.

Despite the success of individuals, with Ana Roš taking the lead, and despite an increased exposure of Slovenia as a new gastronomic destination and the development of local food brands, visitors to Slovenia still do not indicate gastronomic experiences as one of their main motives to visit. This is probably also why an average tourist only spends 15.5% of their daily budget in our bars and restaurants.

Introductory summary

The vision of Slovenia as a gastronomic destination until 2021 is to become a visible destination with a high-quality, innovative, recognisable gastronomy and an authentic culinary range of foods and wines created by a number of boutique providers of high-quality food who build their product range on local production of foods and creative dishes that reflect the natural resources, knowledge and heartiness in preparation

The document came into existence in order to achieve the three key objectives for the development and marketing of gastronomy – creation of a higher added value, provision of sustainability and especially an increase in international visibility. For the visibility of Slovenia as a gastronomic destination and not as a destination that also offers gastronomy, it is key to become engaged in international evaluations, to have Slovenian representatives present at international culinary congresses and to provide a top-end range of culinary products and wines that goes hand in hand with Slovenia as a green, sustainable country and in general a country closely connected to the unspoilt nature.

The parties participating in the preparation of this document were almost unanimous that it is key to support Slovenia to participate at international evaluations (Michelin, Gault & Millau) and also to support chefs to be placed on The World's 50 Best Restaurants list. For now, only Hiša Franko is listed and they already exercise the practice of focused study tours for journalists which is common abroad (particularly for the ones that are suspected to be members of The World's 50 Best Restaurants Academy). Therefore, these study tours that have proven an effective tool for the promotion of a destination must necessarily be extended throughout the country and a wider range of chosen individuals should participate. Top-end culinary destinations that next to Hiša Franko could be ranked in the list of The World's 50 Best Restaurants and could

consequently influence the formation of the perception of gourmets that Slovenia is a gastronomically developed destination, can otherwise not be built without a solid base of providers that should include restaurants with a high-quality range of local culinary products and local resources as well as an assorted chart of top-end local wines. It is restaurants and tourist farms that offer the greatest potential – and the greatest number of deficiencies as well.

This requires education and awareness-raising for the providers to start turning towards strictly local, Slovenian, also home-grown in the case of a tourist farm, and at the same time to produce enough ingenuity and sense for trends and modern techniques.

In recent years, gastronomy tourism has developed a lot and it has become one of the more important elements of the quality of a tourist's experiences. Gastronomy is very important for the promotion of local, regional and national economic development and gastronomic tourists usually represent good guests with more funds to spend on their holidays, they are more environmentally aware and they are more interested in getting to know foreign cultures.

The most competitive culinary destinations for Slovenia include its neighbours – Croatia (in particular Istria that builds on wine and individual products, such as truffles); Austria with a good practice of linking nature and small-scale producers to an integrated gastronomic identity and the image of the country; Hungary as an example of a small country with a relatively difficult cuisine which has managed to climb to become one of the leading countries in this part of Europe, and which also has an increasing number of Michelin stars; and Italy with its exemplary case of a well set gastronomic pyramid with exceptional trattorias.

This is exactly what Slovenia and Slovenian restaurants and inns lack – a greater national culinary identity and self-consciousness. The advantages of Slovenia that can be underlined are its diversity in a small space, superior and original wines, the richness of pristine nature, a well-preserved culinary heritage, its boutique character and the latest success of Ana Roš in the international setting. On the other hand, we can highlight a lack of staffing and low qualifications of waiting staff nearing critical dimensions, poor interconnectedness of providers, low international visibility and often

low quality of product range.

Research show that from the point of view of gastronomy tourism, the most important markets to us include Italy, Austria, Germany as well as France, Great Britain and some Scandinavian countries. Our objective is to attract loyal gastronomic tourists who consume a lot and who are also interested in learning about the traditions and culture of their destination and this is why we must offer as many special experiences as possible and as many things that make Slovenia and its range of gastronomic products as different from competitor countries as possible.

Below, it is described how we intend to achieve this.

In recent years, gastronomy tourism has developed quite significantly and it has become one of the most dynamic and creative segments of tourism. UNWTO underlines that tourist destinations as well as the tourism industry are aware of the importance of gastronomy for the needs of the diversification of tourism and the promotion of local, regional and national economic development. Present-day tourists are more experienced, they have more capital available and they have more free time to dedicate to travelling; a wide range of tourism products enables them to escape from their daily routine and to discover new things. UNWTO (2012) also states that a third of a tourist's expenditure goes on food. The reason attached to this fact is that gastronomy tourism recently developed as an independent tourist product. This is why it is also one of the most important elements on the quality of a tourist's experience.



Definition of gastronomy tourism

One of the definitions most frequently used in literature is the definition by Hall and Sharples (2003), who define gastronomy tourism or food tourism as experiential travel to a food production region for recreational or entertainment reasons which includes visits to primary and secondary food producers, food festivals, food fairs, events, marketplaces, cookery demonstrations, tasting of high-quality produce and products, visits to restaurants or any other activity related to food. Additionally, this experiential travel relates to a certain life style that involves experimenting, learning from other cultures, obtaining new knowledge and understanding the characteristics of tourism products as well as the gastronomic specialities of a region. Therefore, to experience gastronomic tourism, we have everything listed above if this is the main reason or motivation to visit a tourism destination or at least one of the main reasons.

Even if gastronomy is not the main reason to visit a destination, it plays a very important role as a secondary or partial motivation for coming to a certain destination. Strictly speaking, such tourists would not be defined gastronomy tourists, therefore the UNWTO adopted a wider definition of gastronomy tourism. Thus, gastronomy tourism involves tourists and visitors who plan their travelling, partly or in whole, with the objective to taste the cuisine of their destinations or to engage in activities related to gastronomy.

Definition of sustainability in gastronomy

Sustainability is the key component and the advantage of the development of Slovenian tourism. The development of any type of tourism, including gastronomy tourism, must take into consideration the fundamental principles of sustainability and responsibility of tourist organisations and destinations.

In the mid 1990s, a wider definition of sustainability as well as of economic efficiency of tourist organisations was produced and it reflects in three basic points – the growth of a tourist organisation must be economically, socially and ecologically acceptable and sustainable.

Responsible tourism responds to the changes of positions by emphasising the economy, society and environment as the three pillars of sustainable development. Maximum profit may no longer be the only driving force for the operations of tourism businesses; responsibility as a priority in business operations must also be included. Tourists have also become increasingly informed in terms of sustainability. Thus, responsible tourism has lately become key to the survival and international competitiveness. Responsibility can be broken down into economic, social and environmental.

These are the principles that will be taken into account in the development of gastronomic sustainability. The authors of the booklet 'Koraki do zaupanja vredne ponudbe ekološke prehrane v gastronomiji' (The steps to achieve a trustworthy range of products in the area of organic food in gastronomy) (Robačar, Vukmanič, Bavec and Bavec, 2018) define the tendencies of high-quality, healthy and sustainably oriented food product range in gastronomy. They also believe that this entails more organic production, more seasonal foods, more fresh and less precooked food, less (smaller meals) of meat or foodstuffs of animal origin, more creativity in the composition of menus (use of old landraces, seasonal nature of supply, regional specificities, minimal packaging) and more creativity in the establishment of short supply chains as well as a wider consideration of the influence of the industry on the environment (calculation of environmental and carbon dioxide footprint as a criterion for greenhouse gas emissions).

Review of the development of Slovenian gastronomy

Cuisine and gastronomy or food culture in the territory of the present Slovenia have developed through history at an astounding junction of the European Alps, the Mediterranean, the Pannonian Plains and after World War I also of the neighbouring Balkans. This very junction created a wide selection of food forms and meals where we cannot speak of blind acceptance from more or less remote neighbours, even from nations that inhabited this space before the arrival of Slavic peoples; instead, we can speak of constant adaptation of the solutions learnt and based on this, of innovative creation of new tastes that were appropriated and “tailored” to the forms of economic efforts, social relations and a pallet of spiritual creativity. These processes of the formation of Slovenian culinary and gastronomic visibility also intertwined different social environments, from inhabitants of towns and squares, villages, castles, all the way to monasteries that also contributed significantly to the shaping of culinary expertise. According to the research thus far, indigenous cultures were strongly connected with the processing of milk into milk products. These, however, have barely been maintained. The diet of farmers which represented the fundamental social group, was modest and it was connected to cereals, leguminous vegetables and plants that need hoeing. Abundance during holidays was represented by products from slaughtering pigs and it also had a wider communication meaning for local communities. Throughout history, development brought several innovations that caused extensive changes to food. For example, introduction of a three-year crop rotation with set-aside, very quickly adopted buckwheat, the development of consuming pork from Protestantism on, acceptance of certain dishes from the Danube cuisine, etc. The Age of Enlightenment represents a great turning point in food culture. In the late period, specifically in 1799, we got the first Slovenian-language cookbook, the importance of which we are hardly aware of.

With this book, we can show even today that at the end of the 18th century, the Slovenian language and thus our terminology in the area of gastronomy were completely equal to major world languages. In 1868, the first Slovenian cookbook was written by Magdalena Knafelj Pleiweis, which with its later supplements by other authors has been the most frequently reprinted cookbook in a number of issues.

After World War I, the influences of the Balkans on Slovenian cuisine were still fairly modest. They increased after World War II and they were connected to the economic migrations of the inhabitants of the Balkans to Slovenia. So to speak, Slovenia became the junction of the Mediterranean pizza and the Balkan burek, in the 1960s the culture of grilled čevapčiči (minced meat rolls) was introduced, etc. In the 1980s, the development of new restaurants and boutique wine cellars gradually began. In this period, gastronomic awareness began to grow and in the 1990s, the movement of slow food began to assert in Italy and also around some more ambitious individuals in Slovenia, too, which left a strong mark. In 2005, Slovenia joined the oldest gastronomic chain of *Chaîne des Rôtisseurs* and in 2007, it joined the JRE association (*Jeunes Restaurateurs d' Europe*), which brings together several hundred young chefs from all over Europe and Australia. In 2018, the international gourmet guide *Gault & Millau* came to Slovenia and Slovenia was awarded the title of the European Region of Gastronomy 2021.

In 2006, the Development Strategy for Gastronomy in Slovenia was created and it became the fundamental document as well as the guide for the promotion and development of gastronomy in Slovenia. The strategy as the base of gastronomic visibility determined the gastronomic pyramid. In addition to the entire national gastronomic abundance (heritage) and the modern forms, this consists of no less than 24 gastronomic regions or closed cultural and geographic areas, where the concentration of a certain number of dishes is the highest and thus enables their delimitation.

After some supplements, there are now 365 key characteristic or distinctive dishes and beverages in these 24 regions.

Slovenia has some chefs that have also been established abroad. Andrej Kuhar was the first Slovenian to win a Michelin star (he won it for a restaurant in Germany), Joško Sirk, a Slovenian otherwise living abroad, won a star for his restaurant *Pri lovcu* (*Al Cacciatore*) in Subida near Krmin (Cormons), Italy. Janez Bratovž with his restaurant *JB* in Ljubljana was the first to manage to enter the *San Pellegrino* rankings of *The World's 100 Best Restaurants* (2010) and at present the only representative on the list of *The World's 50 Best Restaurants* is *Hiša Franko* (placed 48) led by Ana Roš, who won the title of the *World's Best Female Chef* for 2017. Ana Roš is a member of a number of international associations and she is a regular guest at the largest international culinary congresses. Other chefs active abroad include Tomaž Kavčič, Janez Bratovž, Jure Tomič (*Pasta World Champion* 2016), Luka Košir and some others. The younger generation in particular, led by Bine Volčič, Jorgo Zupan, Jakob Pintar, Leon Pintarič, etc. also boasts several years of experience in foreign kitchens.

In cuisine, wine is particularly important and Slovenian wine producers are more visible and more active abroad than chefs. Individual wine cellars, such as Movia and Kabaj, regularly enter the list of Top 100 Wines selected by the Wine Spectator Magazine, and wine cellars from Goriška Brda are also most popular in the foreign markets, where individual wine producers export 90% of their bottles.

A very special status belongs to the Slovenian wines produced in a sustainable and biodynamic manner, which are becoming increasingly sought and which were also praised by columnist Simon Woolf in his monograph on the so-called orange wines, i.e. Amber revolution. Most sought and visible abroad remain the pioneers of natural, macerated wines, who live abroad, such as

Radikon, Gavner, Princic, Terpin, followed by Movia and Marjan Simčič; niche wine growers include biodynamic wine growers, such as Klinec, Aci Urbajs, Burja, etc. There are many opportunities to improve and a lot of potential for all the wine growing regions, where following the Austrian model wine routes could come to life more.

Even though inns and tourist farms represent one of the most distinguishing features of Slovenia, the former have fallen behind with regard to development in the last decades and they lack connectedness to the local environment. The inns based on rich family traditions include some that preserve top-of-the-line quality and where the holders of the

activity have made a timely pass of their management to their descendants who have received proper schooling in Slovenian as well as in foreign culinary schools.

It is the success of some inns, which have sprouted up lately and where traditional dishes are served in a contemporary way, that proves that both tourists as well as locals desire local products. There is a lot of room for improvement in this field; however, awareness should be raised quite significantly. Service providers in tourist farms also need more confidence, as it occurs all too often that they serve industrial and bought goods and not their own and local.

Key development milestones OF SLOVENIAN GASTRONOMY



A review of the gastronomic tourism market

In recent years, gastronomy has become one of the key motives to travel, particularly to destinations that are believed to be culinary centres. Despite the success of individuals, increasing exposure of Slovenia as a new gastronomic destination and the development of very local projects, visitors to Slovenia still do not mention gastronomic experiences as one of the main motives to visit.

However, there are plenty of opportunities for development here, because it is well known that gastronomy tourists (i.e. foodies) are the ones who are ready to spend the largest amounts of money, that they are considered good guests, they are also mostly interested in culture, history, traditions (particularly those related to dietary habits) and connectedness to nature.

As it turned out in a number of countries and in recent times especially in Scandinavian and South American countries, gastronomy has helped them in making a leap to a higher level of tourism, to a boutique character in the true sense of the word. At the same time, it made the destination visible on a completely different level and thus it also attracted a completely different type of tourists.

As it often turned out, what has been confirmed from the conversations with selected foreign journalists and opinion leaders, the tourists that come to a particular destination especially due to its gastronomy or gastronomy is one of the main motives for their arrival, do not search for “yet another Michelin star” (although the stars do not hurt in any way); they are more interested particularly in its connection to the local environment, in this case Slovenia, its connection to nature, countryside, small, boutique producers, wine growers, fishermen, gatherers, mushroom foragers, cheese makers, etc. Destinations (and restaurants) that follow heritage, environment and seasons and connect all of this into a story, are the ones that help one fully experience their destination.

Competitive destinations

A survey of the opinions of Slovenian gastronomic connoisseurs shows that to Slovenia the most competitive culinary destinations are none other than its neighbours – Croatia (especially Istria with its online Michelin Guide); Austria with a good practice of linking nature and small-scale producers to an integrated gastronomic identity and the image of the country; Hungary as an example of a small country with a relatively difficult cuisine which has managed to climb to become one of the leading countries in this part of Europe; and Italy that with its cuisine and culture is most competitive to the western part of Slovenia. Exceeding the range of these countries, the respondents mention small countries or countries that are more famous for their traditional yet exploited commercial cuisine and wine (Georgia, Slovakia, etc.), the countries with Austro-Hungarian culinary tradition (Germany alongside Austria and Hungary), the countries that managed to build their culinary image “from nothing” but they firmly connected it to nature and tradition (Scandinavia) and Mediterranean countries with their completed and high-profiled status of a culinary destination (Spain, Portugal).

Some of these countries are also among the leading global and European gastronomic destinations, where Spain (with a great emphasis on the Basque country), Italy, France, Japan, individual Asian countries (Hong Kong, South Korea, Vietnam, etc.), Mexico, Morocco, Turkey, etc. In recent years, South American countries have made a giant leap, headed by Peru (as well as Brazil, Chile, Colombia, Bolivia) whereas a lot has already been written about the Scandinavian renaissance, which the entire region owes to Noma. Almost all of the above-mentioned countries have a long culinary tradition and knowledge of preparation and service in common – in these countries, food has a special status. They are all also characterised by the fact that food has become integrated in almost every aspect of travelling and it is key to experiencing a destination and its culture. For all of the above-mentioned countries, it is easy to name at least one typical dish whereas research shows that foreigners remain confused about what exactly is a typical Slovenian dish, despite a handful of protected foodstuffs. For that reason, we recommend a focused promotion of no more than five dishes.

Scandinavian story of success

Scandinavia tends to be pointed out as the best example of how to create a culinary destination; it is a region that was hardly famous as such before the mania cooked up by Noma. Scandinavian restaurants had not been placed on the maps of foodies and nobody knew how to explain what Nordic cuisine supposedly was. Yet, all of this changed in 2003, when Rene Redzepi, a visionary of Danish and Albanian descent wrote a manifesto of the new Nordic cuisine, when he opened (the first) Noma in the port of Copenhagen, including a laboratory designated solely for development. This was the period of the reign of El Bulli (Spain), the best restaurant in the world for years, which developed and perfected the concept of molecular gastronomy. Noma could not have been further away from that. Here, Redzepi focused on resources from not the most fertile or most sun-drenched part of Europe – root vegetables, enzymes, seafood, algae, etc. All of these in their most fundamental, minimalist form. Based on foraging, Redzepi introduced one of the greatest culinary institutions in the history of gastronomy and he made Denmark a culinary destination. Moreover, he was the pioneer of the new culinary style that caused Scandinavia to become one of the must visit spots on the map of every foody. Major backing for this to succeed included a major financial investment of all the governments involved, intensive inviting of foreign journalists and connectedness of Scandinavian chefs.

Neighbouring countries

Scandinavia is a model example; however, we should also have a look at the practices of our neighbours that beat Slovenia quite a lot as culinary destinations. **Croatia** (specifically Istria) with a comparable array of resources and some traditions, managed to break through by highlighting a handful of the most representative and truly excellent resources (olive oil, seafood, truffles, prosciutto, wine), intensive lobbying and courtship especially to the Michelin Guide, which really visited the country at last, and Croatia even became the first country with a web guide, which had not been a practice until then.

Italy has one of the longest culinary traditions in the world with a very good base – simple trattorias with an exquisite product range. Without the basis (inns) one cannot build a culinary destination, regardless of the number of a higher rank restaurants. On the one hand, **Hungary** managed to be positioned with some of the world's famous products (goose liver, Tokaj) and with its tasty traditional gastronomy (goulash, segedin goulash, etc.) and on the other hand they have been producing high-end gastronomy that successfully builds on reinterpretation of classical dishes for a long time.

To Slovenia, **Austria** might be the best example of a country that has built its entire tourist strategy on the image of a green and active country closely connected to nature. Gastronomy, too, falls within this framework, including the exceptionally developed wine roads that could certainly serve as an example for us to develop our wine roads.

Distant Australia

Australia should be mentioned as one of individual countries that until recently were not considered gastronomic destinations but tend to be next to the greatest; especially its western part, where the authorities managed to create one of the most desired destinations among foodies by making a well thought-out and ambitious campaign on gastronomic tourism. Here both the multi-day enogastronomic festival Margaret River, to which the greatest chefs from all over the world were invited and where their most radical natural wine producers were presented, and the targeted tactics of the set of local individuals (a type of ambassadors often represented by wine producers) who lead minor groups of journalists completely freely, money being no object (e.g. with a

helicopter to the territory of Aborigines). Especially festivals and congresses, such as Margaret River, represent a great potential for promotion; however, this requires a harmonised action of both the state (financial support) and restaurant owners and wine producers.

The situation in Slovenia

In general, almost all the countries mentioned by the respondents either as competition to Slovenia or as a strong gastronomic destination, managed to build their image on an uncompromising linking to the environment and the natural conditions, the promotion of the so-called 0 kilometre and on building on their traditions. This is exactly what Slovenia and Slovenian restaurants and inns lack – national identity and self-confidence in our rich and diverse gastronomic tradition. At the same time, it is necessary to connect with the local environment, local suppliers, small farmers and wine producers and to highlight the unspoiled nature as one of the main components of Slovenian gastronomy. Top-end restaurants in city centres with a wide (even foreign) range of wines are most certainly necessary for a certain type of gastronomic tourists; however, it is not necessarily these tourists that truly wish to experience Slovenia as a green, boutique destination closely linked to the environment. However, these more ecologically oriented gastronomic tourists certainly tend to be ready to spend much more than average tourists at a certain destination.

For information: on average, a tourist spends a third of their daily budget on food and beverages (UNWTO, 2012; OECD, 2012); however, the latest data for Slovenia shows that an average tourist only spends 15.5% of their daily budget in our inns and restaurants.

Price comparison

Prices of tasting menus by top restaurants in Slovenia are comparable to the rest of the world and compared to our closest competition (Istria, Austria, Hungary, Friuli), they are even about 10 to 15% lower. Hiša Franko has the most expensive tasting menu in Slovenia (€150 for the 11-course menu without the wine accompaniment, which costs €75), but we are talking about the restaurant ranked 48 according to The World's 50 Best Restaurants list. For comparison: In Nahme (restaurant ranked 49, Bangkok, 1 Michelin star), you will be charged €74 for the tasting menu, in the restaurant of Schauenstein Castle (restaurant ranked 47, Switzerland, 3 Michelin stars) you will be charged €240 for a 6-course menu. Based on the competitiveness of destinations and restaurants, we should also mention Steirereck (Vienna, ranked 14th in the world, 2 Michelin stars) with €165 for a 7-course tasting menu; Reale (Castel di Sangro, Italy, 3 Michelin stars) with €190 for an 11-course menu and Monte (Rovinj, 1 Michelin star) with €114 for a 6-course menu. In Onyx, the best Hungarian restaurant (2 Michelin stars), the 6-course menu will cost you €105, while in Argine a Venco (1 Michelin star) across the border in Colli, where Antonia Klugman, who tends to be compared to Ana Roš, makes her creations, the price of the 10-course menu stands at €110.





SWOT – analysis of the Slovenian gastronomic range of products

ADVANTAGES

- variety of supply on a small space,
- premium wines,
- wealth of nature,
- rich food heritage,
- boutique character,
- Ana Roš and other top chefs,
- the bee,
- protected food, wine and spirits,
- care for hygiene and safety,
- variety of flavours of one foodstuff at different ends of Slovenia.

WEAKNESSES

- lack of staff,
- poor connectedness of providers,
- low international visibility,
- low qualifications,
- low quality of service,
- low quality of supply,
- black market labour,
- unfair competition,
- poor education,
- poor knowledge of stories about food, dishes and drinks, and the upgrading of individual traditional dishes.

OPPORTUNITIES

- international visibility of Ana Roš and other top chefs,
- the arrival of Gault & Millau, Michelin,
- demand for new destinations,
- demand for sustainable destinations (with preserved and untouched nature),
- change of eating habits (eating outside more frequently),
- demand for organically processed foods,
- care for healthy living and eating,
- implementation of activities related to the project Slovenia European Region of Gastronomy 2021.

DANGERS

- legal restrictions,
- tax burden on labour,
- standardisation (too many standards),
- taking over popular foreign gastronomic trends and projects,
- insufficient demand of foreign guests in certain regions,
- supply that adapts to mass tourism but not to gastronomic tourism.

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AWARDED 2021



**The title that brings the commitment of development,
cross-sectoral cooperation and the promotion of
Slovenia's gastronomy**

Through its effects, it contributes to sustainable global development, promotes sustainable gastronomic tourism, supports local self-sufficiency, links rural and urban areas, emphasizes the importance of food for health and provides support to small and medium-sized enterprises.

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Main strategic areas

This chapter is the central part of the document. It is divided into five sub-chapters, each representing one of the key strategic areas critical to the successful development and marketing of Slovenian gastronomic tourism.

The main strategic areas include:

- **regulatory framework,**
- **trademarks and quality evaluations,**
- **promotion of increasing quality,**
- **education,**
- **marketing.**

The document Action Plan for the Development and Marketing of Gastronomy Tourism 2019–2023 came into existence in order to identify the key measures and initiatives necessary for Slovenia to be positioned around the world as a unique boutique gastronomic destination.

That is why every strategic area presented with a brief analysis of the situation and a list of initiatives/measures for the regulation and upgrading the current state. The sum of all the measures together with the providers is presented in the chapter Strategic Priorities Overview.

Being selected the European Region of Gastronomy will certainly help achieve the target status, which will strengthen the national promotion of cuisine and gastronomy and thus create a synergy with local environments, cultures.

The title Slovenia European Region of Gastronomy 2021 helps open up excellent opportunities for making cross-sectoral connections in the field of food, gastronomy, cuisine, catering, tourism, culture, health, principles of sustainability, etc.

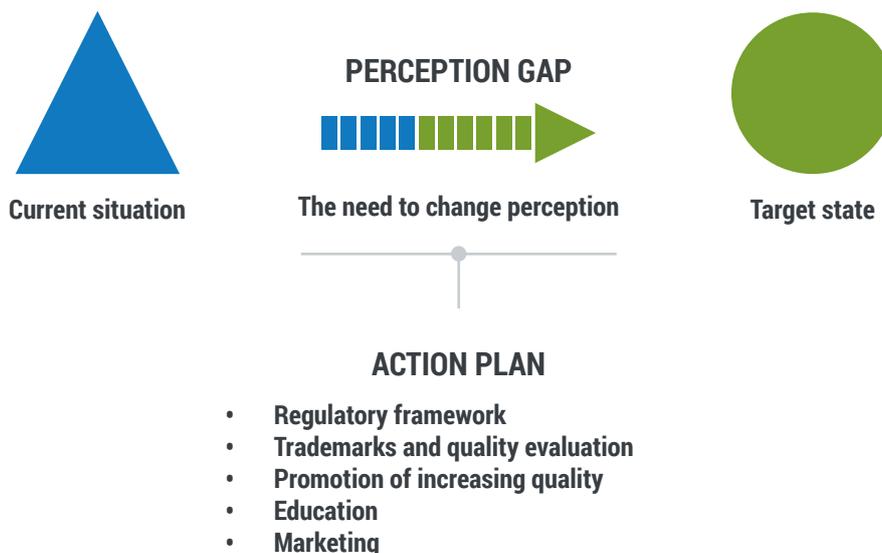
Despite the basic principles laid down in Slovenia's Gastronomy Strategy from 2006, relatively poor cooperation and compliance with certain starting points in individual state departments has been demonstrated.

That is why our membership of the ERG platform offers us an opportunity for a better connection of agriculture with gastronomy and tourism.

Gastronomy can become an important promoter of local and regional development in the fields of economy, culture, social relations and environmental protection.

Slovenia also entered the ERG platform because it is aware of the importance of networking and the recognition of good practices. These can be offered by Slovenia for some specific areas, for example, in the field of education in elementary schools.

Analysis STATES AND GAPS



Initiatives/measures:

- *Clearer definition of minimum quality standards in hospitality establishments, conditions for performance of activities and their classification (categorisation of HE).*
- *Unburdening of wages in hospitality industry.*
- *Simplification of the guidelines for good hygiene practices and the application of HACCP principles in hospitality industry.*
- *Identification and removal of administrative barriers (simplification of procedures for opening an HE and for obtaining foreign workers).*

As key obstacles in legal restriction we identify insufficient classification of catering establishments in the Hospitality Industry Act and inadequate quality criteria for catering establishments, excessive tax burden on labour, long-term procedures in recruiting foreign labour, inflexibility of employment, strict rules in the field of hygiene and excessive need for traceability of foodstuffs (for example, pickers, own-produced foods, special foods, such as edible dormouse, frogs, etc.).

Clearer definition of minimum quality standards in catering establishments, conditions for performance of activities and their classification (categorisation of HE).

In addition to the Hospitality Industry Act, the main rules that also refer to gastronomy are the Rules on Minimal Technical Requirements and on the Scope of Services for Hospitality Operations. The Act and the Rules cover the area of catering establishments very loosely, since they merely indicate the minimum criteria that set minimum technical standards for individual types of catering establishments. The authors of Slovenia's Gastronomy Strategy already found back in 2006 that we do not have the criteria for determining the quality of gastronomic supply in Slovenia; therefore, they proposed to create basic criteria to determine at least the level of an inn, a guest house, a restaurant and a tourist farm (Sibila Lebe et al., 2006). For inns, this requirement was at least partially satisfied in the Gostilna Slovenija project, while for the rest, the basic criteria remain unclear. The criteria must be revised and updated, and above all, it must be redefined where catering activities may be performed and in accordance with the legislation, the conditions for everyone engaged in these activities (shops, catering establishments and tourist farms, etc.) must be adapted to prevent unfair competition.

Unburdening of wages in the hospitality industry

The insufficient incentives for employees in the hospitality and tourism sectors are also recognised in the Strategy for the Sustainable Growth of Slovenian Tourism

2017–2021 (hereinafter referred to as the 'Umbrella Strategy'). It has been established that tourism companies do not generally have adequate systems for rewarding and promotion of employees and other incentives that would contribute to the motivation and loyalty of employees. In addition, working conditions in hotels and tourism are more difficult and wages are lower. In the Strategy, the Ministry of Economic Development and Technology (hereinafter: MGRT) does not mention any measures for lowering the tax burden on employees' salaries, which is also evident from the low competitiveness of the WEF TTC index, but this measure will soon have to be adopted throughout the economy in order to reduce the lag in competitiveness with other countries. This measure requires a wider consensus among political parties on the reallocation of taxes. Although this measure surpasses the Action Plan, we believe it must be mentioned and that this is one of the biggest obstacles for the development and, in particular, the recruitment of staff to work in the hospitality industry. Hospitality service providers also point to the lack of flexible forms of labour recruitment.

Simplification of guidelines for good hygiene practice and the application of HACCP principles in hospitality services

Another aspect of the limitations in the development of gastronomy is the guidelines for good hygiene practice and the application of the HACCP principles in hospitality services. The Umbrella Strategy mentions issues and solutions in this area. HACCP standards are included in the general EU legal act – Regulation EC/852/2004 applicable to all EU Member States. To facilitate the implementation of this Regulation, hospitality stakeholders (OZS) have prepared guidelines for good hygiene practice and the application of the HACCP principles in hospitality services which were approved in 2010 by the Ministry of Health. Their main purpose is to facilitate the implementation of the regulatory requirements in the field of good hygiene practice and the application of HACCP principles in hospitality services. The Umbrella Strategy considers that the guidelines are prepared in certain respects and that they are contrary to the Slovenian vision of the development of culinary art as a tourist product and that they reduce the competitiveness of the sector. Therefore, it is proposed to simplify the guidelines for good hygiene practice and the application of HACCP principles in hospitality services.

Thus, the Umbrella Strategy already defines that the MGRT and other relevant ministries, the Tourism and Hospitality Chamber of Slovenia (TGZS) and the Chamber of Crafts and Small Business of Slovenia (OZS), should initiate the procedure for simplifying the guidelines for good hygiene practice and the application of the HACCP principles in hospitality services. In cooperation with market stakeholders, it is necessary to define all the procedures that make the day-to-day business difficult and to propose the necessary simplifications in line with real market opportunities and needs. The use of local/organic foodstuffs from the garden or forest for all gastronomic providers (both for HEs and tourist farms) must be allowed as well as enough space for the development of the culinary art as a tourist product and a clear distinction between the requirements for various hospitality establishments.

Identification and removal of administrative barriers (simplification of procedures for opening an HE and for obtaining foreign workers)

Substantial problems also arise in the opening of new, innovative small businesses and the transformation of existing ones. We suggest that the chambers identify all the obstacles (TGZS, OZS) and find proper solutions in cooperation with the competent ministries.

Another aspect of the barriers is the recruitment of personnel from abroad. Hospitality service providers and the general public note that Slovenia lacks interest in working in hospitality services. In recent years, especially the ones that need more staff (hotels, catering), have imported their labour force from the neighbouring countries. And they conclude that these procedures are too slow. Procedures must be reviewed (TGZS, OZS) and in cooperation with the relevant ministries, proper solutions should be sought to enable a faster recruitment of labour force from abroad.

Gault & Millau

L'expert gourmand
Slove

Initiatives/measures:

- *Introduction of the international gastronomic guide Michelin Slovenia.*
- *Preservation and promotion of the international gastronomic guide Gault & Millau Slovenia.*
- *Conditional introduction of the national evaluation system.*
- *Support to hospitality service providers to rank on The World's 50 Best Restaurants list.*

After reviewing the key trademarks of quality and quality evaluations in the field of gastronomy at home and abroad, we found that among stakeholders (hospitality service providers, local and regional tourist organisations, wine producers, advisory and educational organisations, representatives of local communities, growers) Michelin, the national evaluation and Gault & Millau are the most appreciated in Slovenia. In 2006, the authors of the Strategy of Gastronomy suggested (Sibila Lebe et al.) that in Slovenia similar procedures and methods are used as abroad, where they possess many evaluation systems represented by top gastronomic and culinary guides. Therefore, we suggest the potential initiatives to use in Slovenia to achieve international recognition, one of the key goals for the development and marketing of gastronomy.

Introduction of the international gastronomic guide Michelin Slovenia
Slovenia has no internationally visible signs of quality in the field of gastronomy. If we want to become internationally recognisable and above all a competitive tourist destination, we need these quality signs. This is not only important for Slovenia as a destination for gourmets, but for Slovenia as a destination attractive for all tourists. The Michelin Guide should be brought to Slovenia and its functioning should be supported.

Preservation and promotion of the international gastronomic guide Gault & Millau Slovenia
The fact is that in recent years Slovenia was ranked in the second most famous gastronomic guide – Gault & Millau, namely in

the Austrian one. In 2018, Slovenia acquired its guide Gault & Millau Slovenia. For the development and marketing of gastronomy, it is of strategic importance that this evaluation is maintained and that the guide is published annually, especially due to the fact that the guide covers a wide range of hospitality establishments and staff in the evaluation and that it allows the introduction of new categories for food and wine producers, which is extremely important in terms of the promotion of increasing quality and sustainability. It is therefore necessary to support its functioning.

Conditional introduction of a national evaluation system

For Slovenia, both international guides Michelin and Gault & Millau, offering reliable information on the quality of supply, are crucial. If necessary, a national evaluation system can be organised, which following the model of some foreign destination quality labels is held by the Slovenian Tourist Board and/or the Tourism and Hospitality Chamber of Slovenia that can also invite external experts to conduct the evaluation. The measure is to create methodology and carry out evaluations.

Support for hospitality service providers to rank on The World's 50 Best Restaurants list

For the truly top segment of loyal gastronomic tourists, it is unfortunately not enough for the hospitality service providers just to be placed in international guides. They are looking for special experiences, gastronomic movements and avant-garde culinary reflections embodied by providers ranked in The World's 50 Best Restaurants list. If we want these gastronomic tourists to experience Slovenia as a recognisable gastronomic destination, the list of Slovenian providers ranking in the list should be expanded.

This can be done by deliberate marketing activities:

- in organising and conducting study tours and other activities for opinion decision makers in the field of gastronomy,
- with the participation of representatives of the STB and top chefs at key international congresses and meetings abroad,
- by organising internationally acclaimed events in Slovenia, hosting renowned foreign chefs and opinion makers in Slovenia.

Initiatives/measures:

- *Taste Slovenia: a reformation of the gastronomic pyramid and the adaptation of typical dishes according to the model of tourist macrodestinations.*
- *Activities and all projects of the European gastronomic region as an umbrella development project.*
- *Encouraging local producers and producers of protected products, wines and spirits to sell top-quality crops and quality HE.*
- *Further development of the Gostilna Slovenija trademark.*
- *Assistance in applying projects for EU funds.*
- *SRIPT activities.*



The shareholders note that the quality of all types of HE in Slovenia is very variable. As we have shown in the characteristics of consumption of foreign tourists in Slovenia, they spend little on food in bars and restaurants (an average of €15.50 per day, source: SURS). Satisfaction with the gastronomic range of products exists, however, they do not spend more money. The questions that arise are whether or not we attract the right gastronomic tourists or whether they are not included in the survey on the characteristics of foreign tourists in Slovenia. Whatever the answers, stakeholders in the gastronomic tourism emphasise that more needs to be done to raise the quality of the supply and to provide services (this topic is discussed in more detail in the Education section) and to increase the reputation of the providers.

Taste Slovenia: a reformation of the gastronomic pyramid and the adaptation of typical dishes according to the model of tourist macrodestinations

The greatest breakthrough in the systematic strategic development of gastronomy was achieved through the creation of the Strategy of Gastronomy in 2006 and the implemented measures and activities.

The strategy determined the gastronomic pyramid as the base of gastronomic visibility. In addition to the entire national gastronomic abundance (heritage) and modern forms, it consists of 24 gastronomic regions and concluded cultural and geographical areas with the greatest concentration of a certain number of dishes that enables their confinement. In these 24 regions, according to some additions, there are now 365 typical or recognisable dishes and beverages. From this selection, the strategy identified the recognisable top of the gastronomic pyramid, which represents a binding starting point for the Slovenian gastronomic visibility. The strategy also defines the basic slogan of gastronomic visibility, i.e. Taste Slovenia, and its version of Tastes of Slovenia. Although authors mention this project as a marketing project, it is basically a development project that has helped to identify and stock survey typical foods that are more

easily developed and marketed by providers under a recognisable trademark. In addition to the flagship trademark of Taste Slovenia, local and regional trademarks in the field of culinary art and gastronomy have been developed in the last few years (for example, Tastes of Ljubljana, Tastes of Kamnik, Tastes of Radol'ca, etc.) The 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism established a model of macrodestinations, which is a platform for organisational and marketing optimisation of Slovenian tourism. The existing model of 24 gastronomic regions should be adapted to the model of 4 tourist macrodestinations, which should identify recognisable dishes and beverages. In compliance with the current trends in the field of gastronomy, the gastronomic pyramid of Slovenia needs to be adapted.

Activities and all the projects of the European gastronomic region as an umbrella development project

In 2018, Slovenia was nominated and selected as the European Region of Gastronomy 2021. In total, 47 projects are listed in the nominations paper (available here: www.slovenia.info/uploads/publikacije/taste_slovenia/okusiti-slovenijo.pdf).

Encouraging local producers and producers of protected products, wines and spirits to sell top-quality crops and quality HE

Many top chefs mention the problem of regular supply of local products and supply at competitive prices. In order to achieve the idea of a framework story of Slovenian gastronomy, it is necessary to subsidise producers who offer top quality products for sale in top quality and high quality HE (agreement between TGZS, OZS and MKGP). On the other hand, it is necessary to encourage hotels, top-notch restaurants, quality HE, inns, tourist farms and other stakeholders to better integrate local food providers with the aim of increasing the proportion of those who offer at least one meal (e.g. breakfast) with local products (honey, bread, beverages, eggs, yoghurt, milk, etc.).

Further development of the brand Gostilna Slovenija

Inns are the most distinctive and visible type of hospitality establishment in Slovenia, which is based on family tradition, local and regional dishes, and Slovenian beverages. The Catering and Tourism Section at the OZS under the collective trademark name of Gostilna Slovenija takes care of the development of standards and the promotion of inns which are united under the trademark of Gostilna Slovenija. There are currently 43 inns which meet the prescribed conditions for the use of this trademark. The OZS believe that the project needs renovation and upgrading in order to increase membership and improve trademark visibility.

In order to bring the Gostilna Slovenija project back to life, it is necessary to:

- modernise the rules governing the right to use the trademark, to which new inns that are not members of the OZS should also be eligible,
- review and, if necessary, revise the criteria/standards by which it is judged whether a particular inn may be granted the right to use a trademark,
- completely change the way in which inns are evaluated in the sense that the evaluation becomes anonymous and free of charge for the providers,
- make the trademark of Gostilna Slovenija visible internationally (communication plan).

Assistance in applying projects for EU funds

Gastronomic providers emphasise that it is difficult to find time for additional business and administrative activities in addition to their everyday obligations, therefore they would like some assistance.

We suggest that the TGZS and OZS strengthen advisory assistance to these providers in order to obtain EU funds.

Activities SRIPT

To make a technological breakthrough in the following years, Slovenia has developed a plan, which is defined in the Smart Specialisation Strategy (S4). In each of the nine areas of S4 use – one of them being sustainable tourism – one SRIPT partnership was formed at the end of 2016. The Coordinator of the Strategic Research and Innovation Partnerships – SRIPT project is the Tourism and Hospitality Chamber of Slovenia. It is a partnership between tourism companies and educational and research institutions with the aim of integrating knowledge and designing practical solutions for future business development. Activities are implemented in four areas: information-based marketing and networking, knowledge for raising the quality of services, technological solutions for sustainable use of resources in accommodation facilities and the Green Scheme of Slovenian Tourism.

From the point of view of increasing the quality of supply, the key projects include the Tourist Innovation Centre and the Systems for the Design of Internal Quality Standards. Both projects are of advisory nature and they offer gastronomic tourism providers the opportunity to obtain appropriate expert advice for the development of their supply in various areas in one place (hotel industry, hospitality industry, culinary art, gastronomy, food, design, architecture, music, ethnology, anthropology, urbanism, landscape architecture, psychology, economics and business science, medicine, etc.).

Initiatives/measures:

- *Improvements to the education system.*
- *A system of paid apprenticeship and mentoring.*
- *Permanent training at the HT Academy and other educational organisations.*
- *Promotion and popularisation of vocations in the hospitality industry.*
- *Raising awareness of providers to improve their quality of supply.*
- *Raising awareness of the nutrition culture and the richness of local foods, protected foods, wines and spirits.*
- *International exchange of chefs.*

In the last two decades, the volume of Slovenian tourism has increased considerably.

Accordingly, the need for well-trained staff has increased. This need has reached its peak in the last two years, when hospitality service providers accept anyone prepared to work in the kitchen and catering.

Improvements in the education system

The authors of the Umbrella Strategy and the Government of the Republic of Slovenia that adopted this document believe that this challenge should be addressed firmly and in all areas, both in terms of the vertical dimension of formal education as well as non-formal and informal learning, improvement of competences and skills of employees and employers' initiatives to use these skills. This is also supported by the stakeholders interviewed on the ground.

The Umbrella Strategy states that main need recognised is the need for a shift in vocational education. Employers in tourism have the highest demand for staff with a secondary vocational education (75% of all jobs in this class) and secondary vocational or lower vocational education (in both cases, just over 10% of employees). Therefore, formal vocational education needs to continue to approach the needs of the economy and develop a system of effective education in enterprises to further improve the quality of vocational education.

System of paid apprenticeship and paid mentoring with the best chefs in Slovenia

Apprenticeship programme which became applicable again with the adoption of the Apprenticeship Act in May 2017. The task of educational institutions is to approach this in a systematic manner and to send the best students to train with the best and explain to them that this is an advantage that is not available to everyone. The policy is to include several pupils and students in the system, to clearly set the goals with regard to the competences to be mastered, so that they are rewarded for their work themselves as well as their mentors.

Permanent training at the HT (Hospitality, Tourism) Academy and other educational organisations

The HT Academy of the Tourism and Hospitality Chamber of Slovenia – TGZS is a national centre for functional training in hospitality and tourism. The Umbrella Strategy states that we also lag far behind in the field of in-service training, because companies do not have comprehensive training programmes for their employees. Even

the largest tourist company in Slovenia is small at the global level, which is why cooperation between companies within the industry in in-service training is important. The Umbrella Strategy places a special role in the development of human resources on the Tourism and Hospitality Chamber of Slovenia as the main coordinator of SRIPT. The aim pursued by the HT Academy is to promote education and practical training of tourism companies' employees according to their needs (for example, the vertical and horizontal exchange of employees in companies or sending employees to training and enabling high-quality employees to transfer their knowledge to other companies, which means systematic transfer of knowledge and improvement of competences, and consequently the increase in the quality of services in tourism).

Promotion and popularisation of vocations in the hospitality industry

The fact is that vocations in the hospitality industry are not popular and that enrolment in hospitality schools is decreasing. In addition, the vocations of waiters and chefs are constantly described in the media as extremely difficult and poorly paid. Well-planned projects need to raise interest in the hospitality industry and restore their reputation. Certainly, this includes competitions (e.g. the European Young Chef Award and competitions at the Hospitality and Tourism Assembly of Slovenia) and awards for the best service providers (e.g. the best (young) chef, the chef of the future and the best waiter in the evaluation by Gault & Millau Slovenia).

Raising the awareness of providers for improving their quality of supply and projects in this field (Taste Slovenia, Gostilna Slovenije), promotion of local foods and resources and dissemination of knowledge about their use

Here, it is primarily necessary to improve the awareness of the providers that the key use of resources that are local, seasonal and that promote Slovenia as a green country closely connected to nature, namely, the emphasis is on foraging, cheeses and dairy products in all forms, various meats, especially game, the development of traditional dishes into a more contemporary form, more suited to modern people. It also makes sense to offer food products that are almost unique to Slovenia and that are difficult to get elsewhere (bear meat).

Raising awareness among young people about the nutrition culture and the richness of local foodstuffs, protected foodstuffs, wines and spirits through the housekeeping lessons in kindergartens and elementary schools

France should serve as an example, because they have developed an extraordinary programme in schools for getting acquainted with the French cuisine as well as the supply of snacks and lunches. For example, pupils already learn about French wine culture in elementary schools, which has been proven not to promote alcoholism, but to educate. Good practice in Slovenia is carried out in the Posočje region with the Soča trout and other fish of the Tolmin fishing family and the Faraonka project. There are several such projects and they are identified as projects of the European Region of Gastronomy. Food should go hand in hand with learning about traditions (for example, cheese tradition, etc.) as well as about wine production, which is of key importance to Slovenia. Similarly, pig slaughtering education, etc., is also important.

International exchange of chefs, organisation of workshops and academies of renowned foreign chefs in Slovenia and guest performances of renowned chefs in Slovenia (pop-up chef).

It is important to encourage young chefs at schools of hospitality to enrol in traineeships abroad. At the same time, schools of hospitality should cooperate with the established Slovenian chefs by the principle of give and take: a chef comes to lecture and share their rich experience with young people, and the school sends their best students to practice with the best Slovenian chefs. Likewise, it is key to organise workshops/lectures/congresses with foreign chefs (good examples of this in our neighbourhood include Care's in Alta Badia, Ein Prosit in Tarvisio, Chef's Stage in Šibenik, Terroir Budapest in Budapest, etc.). Guest performances of established chefs are important as well (for now, there are few here and one of the few exceptions was Massimo Bottura in 2017; otherwise, a series of chefs who have cooked with Ana Roš in Hiša Franko) and perhaps an opportunity for the young to work with them for one evening.

The central chambers (TGZS and OZS), educational organisations, companies and line ministries (economy, agriculture, education) can play a key role in these activities.

Initiatives/measures:

- *Vision of Slovenia as a gastronomy tourism destination.*
- *Marketing goals.*
- *Target groups.*
- *Markets.*
- *Main gastronomy products.*
- *Positioning strategy of Slovenia as a gastronomy tourism destination.*
- *Slovenia's gastronomic supply by macrodestinations.*
- *Marketing communication tools.*



Gastronomy has always played an important role in the marketing of Slovenian tourism, as it was mentioned in all the development strategies as one of the main tourist products of Slovenia. The biggest shift was made in 2006, when we received the first independent strategy of gastronomy and implementation activities, which led to the creation of a gastronomic pyramid, the trademark Taste Slovenia and all the activities related to it. All these years, the Slovenian Tourist Board has been successful in the field of gastronomy marketing.

In accordance with the guidelines of the Umbrella Strategy, the time has come for gastronomy as one of the key tourist products, with the potential of creating high added value, to get a new impetus.

In the preparation of the Action Plan for the Development and Marketing of Slovenia's Gastronomy we took into account the basic orientation, namely the vision and key measures of gastronomy, as defined by the current 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism.

Vision of Slovenia as a gastronomy tourism destination

Slovenia becomes a recognisable destination with high-quality, innovative, and authentic food and wine, created by a number of boutique providers who have received a large number of the most prestigious awards, and traditional restaurants based on local traditions and hospitality. Gastronomy is a motivation for the arrival of tourists all year round.

Marketing goals

The key three objectives of the development and marketing of gastronomy at national and macrodestination levels are:

- raising international visibility,
- ensuring sustainability,
- creating higher added value.

Key indicators of success (KIS) have been identified for individual goals.

Key INDICATORS OF SUCCESS

OBJECTIVE	KEY INDICATORS OF SUCCESS	SOURCE
Visibility	<ul style="list-style-type: none"> • Arrival of the international Michelin guide to Slovenia • Strengthening the presence of Gault & Millau Slovenia • Regular listing of Slovenian restaurants on the The World's 50 Best Restaurants 	<p>Michelin</p> <p>Gault & Millau</p> <p>The World's 50 Best Restaurants</p>
Sustainability	<ul style="list-style-type: none"> • Increase in the number of green supply chains • Increase in the level of self-sufficiency of Slovenia by individual food types • Continuous increase in the share of organic foods 	<p>Various sources, especially LTOs</p> <p>SURS, MKGP</p> <p>MKGP</p>
Higher added value	<ul style="list-style-type: none"> • Higher added value in hospitality services per employee • Increased spending per tourist 	<p>AJPES</p> <p>SURS</p>

Target groups

The key target groups and markets are defined through a review of literature in the field of segmentation and two fundamental surveys: The 'Slovenian Tourism Target Group Personas' study (2016) and 'Identification of Market Potential in Selected Markets' (2018) and supplemented and verified with the stakeholders. Literature review lists various designations for individual segments of gastronomy tourists. After reviewing these designations, it can be concluded that the segments of gastronomy tourists are broken down according to the strength of gastronomy as a motive for their arrival – primary, secondary or no motive (just need).

Loyal gastronomic tourists

The first group of gastronomic tourists includes the so-called loyal gastronomic tourists, whose primary motive for arrival at a certain destination is gastronomy or it is at least one of their main activities at a particular destination. Loyal gastronomic tourists expect a top-notch service, top quality cuisine, they want to try something new, something trendy, they want to be pampered and to enjoy the culinary and wine delights of Slovenia, they want to get to know local food, they want a lot of pleasure and fun, they want special experiences. Among these, we classified those personas of the Slovenian tourism whose primary motive is the gastronomic range of products. These include social foodies and urban consumers.

Interested gastronomic tourists

Interested gastronomic tourists have other motives for coming to Slovenia and they are related to health, wellness, nature or genuine

experiences of the city and the entertainment in it. First, they want to get in touch with the local, healthy diet, mainly in traditional inns, and less price sensitive personas also in top restaurants with local, fresh and healthy foods. Those looking to experience the city will be interested in the local scene, premises for young people, trendy outlets, fast food outlets, pubs, bars and the like. They are also very interested in gastronomic events. Among these, we have classified those personas of Slovenian tourism who are interested in gastronomic supply when they are already in Slovenia, otherwise the primary of their motive lay somewhere else. These include relaxed escapists, beauty indulgence lovers, forever young, active nostalgists, urban conscious and carefree youth.

Random gastronomic tourists

Food is a daily necessity for every tourist and practically an urgent need. Random gastronomic tourists include those who are visiting a destination, but they will choose gastronomic products at random, and at a location they are visiting for their primary motives. They will expect a good gastronomic range of products for a lower price in all types of gastronomic supply.

Among these we classified those personas of Slovenian tourism who are not interested in gastronomic supply, but we expect them to consume it during their stay in Slovenia. These are green explorers, adventurists, devoted mothers and active families.

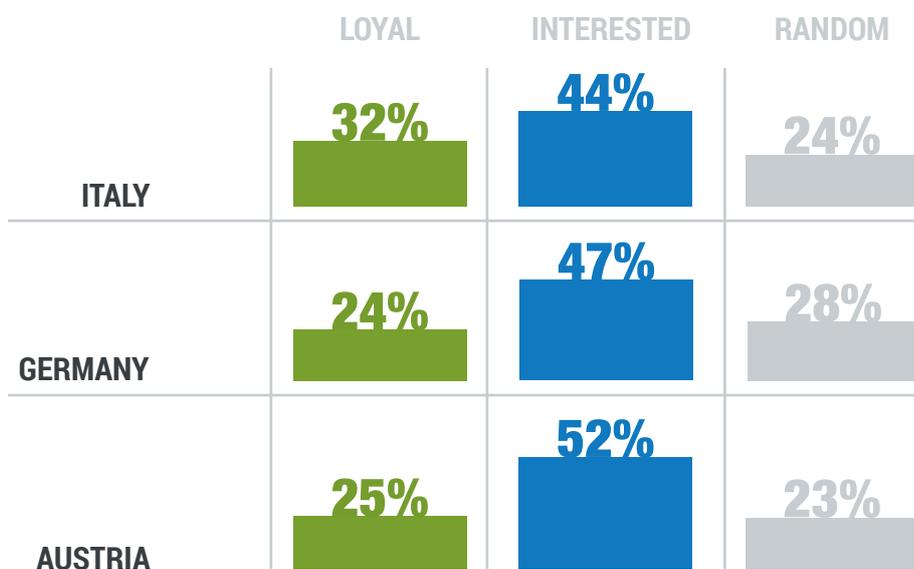
Markets

Based on the Identification of market potential and the SURS data on the number of tourist arrivals, the size and structure of the gastronomic tourists market was assessed for 15 European countries. The data is presented in more detail in on page 52 of the Appendix. In all the markets observed, the segment of interested gastronomic tourists prevails.

The largest share of loyal gastronomic tourists is in Spain, Italy and the United Kingdom (one third of all), followed by Russia, France and Denmark. Lately, a segment of the Swiss and Swedes has been growing among gastronomic tourists. There is also an increase in guests from overseas markets, especially from the USA and Australia.

Structure and size of the market

GASTRONOMIC TOURISTS BY COUNTRIES



Based on the share of overnight stays created by foreign tourists in Slovenia, the following countries represent the main markets even when we talk about gastronomic tourists: Italy, Austria and Germany.

Source: information from Valicon and SURS processed by authors.

Characteristics of gastronomic tourists

Types of gastronomy tourism	Personas	Main gastronomic products	Special emphasis	Destinations	What influences decision making
LOYAL	Sociable foodies	Top restaurants, wine cellars, special gastronomic experiences in nature.	Tasting and experiencing superlatives; enjoying; learning something new; they are interested in cooking, culture, history.	Central Slovenia, Primorska	Web, recommendations from individuals
	Urban consumers	Top restaurants, gastronomic events.	Enjoying and pampering in the city; enjoying in trendy restaurants, visiting events, disconnection; lots of fun; eating in different places.	Central Slovenia	Media (TV, printed media)
INTERESTED	Relaxed escapists	Top restaurants (and other top-quality HEs), inns, wine cellars, gastronomic supply on tourist farms and at food producers, special gastronomic experiences in nature.	Escape from everyday life into nature; care for health; aesthetics; excellent food; looking for special experiences.	Pannonian Slovenia, Primorska	Web, recommendations from individuals, local information
	Beauty and indulgence lovers	Top restaurants, another HE.	Pampering, exclusive, prestigious, luxurious, comfort, visiting top-level restaurants in 5-star hotels.	Pannonia Slovenia, Coast	Web, local information, travel agencies
	Forever young	Quality and top-notch restaurants, inns, gastronomic supply at tourist farms and food producers, special gastronomic experiences in nature.	Enjoying healthy food, health, drinking healing water, massage, secondary learning about the environment.	Coast and the Karst, Pannonian Slovenia	Printed guides, web, recommendations from individuals
	Active nostalgists	Inns, wine cellars, gastronomic supply on tourist farms and at food producers, special gastronomic experiences in nature, gastronomic events.	Nature, natural parks and attractions, easier sports activities, gardening.	North Primorska, Alps, Pohorje, Notranjska and Dolenjska	World Wide Web, local information
	Urban conscious	Gastronomic events, high-quality restaurants, inns.	Live like the local population, visit hipster events, street eating, urban environment, craft breweries.	Central Slovenia, Maribor	World Wide Web, local information
	Carefree youth	High-quality restaurants, inns, other HE, gastronomic events.	Bars for young people, pubs, burgers, sausages, fast food, parties, drinking, concerts.	Ljubljana, Coast, Maribor, Bled	Web, recommendations
RANDOM	Green explorers	Quality restaurants, inns, wine cellars, gastronomic supply at tourist farms and food producers, special gastronomic experiences in nature.	Getting to know the diversity of the country, easy activities in nature, getting to know the main attractions – food somewhere on the go.	All western Slovenia	Web, printed guides, local information
	Adventurists	Inns, gastronomic supply at tourist farms and food producers.	Sports (adrenaline and water sports, hiking), nature – eating somewhere on the go, genuine and authentic range of products.	Alps, Savinjska, Kočevska and Dolenjska	Media (TV, printed media)
	Devoted mothers	Quality restaurants and inns, gastronomic supply at tourist farms and food producers, special gastronomic experiences in nature.	Experiences in nature with family; eating somewhere on the go.	Alps, Notranjska, Kočevje, Dolenjska, North-east Slovenia	Local information
	Active families	Quality restaurants and inns, gastronomic supply at tourist farms and food producers, special gastronomic experiences in nature.	Activities in nature, cycling, experiencing something new – eating somewhere on the go.	Alps, Primorska and Kras, Savinjska, Pohorje	Web, printed guides

Source: information from Valicon (2016) processed by authors.



Main gastronomic products

In the drafting of the document, we identified eight major gastronomic products of Slovenia. A wide range of gastronomic products is an excellent opportunity to connect gastronomy with other tourist products, such as culture, round trips, experiences of nature, health and well-being, hiking and cycling, countryside tourism and business meetings and events. Considering the great market potential, natural features of Slovenia and outstanding individuals, we suggest that gastronomy becomes a link to all tourism products. To the segment of loyal gastronomic tourists it is being marketed as a stand-alone product, and to the segment of the interested gastronomic tourists in connection with other products (e.g. a round trip around Slovenian castles with wine tastings, culinary events in mountain lodges, etc.).

Top restaurants and other HE

This includes all restaurants and other hospitality establishments (inns, snack bars, bistros, etc.) listed on Gault & Millau Slovenia with more than 15 points. Such restaurants have an individual approach to their guests. They have acknowledged chefs and well-trained staff. Their menus show great creativity and complexity, the use of imaginative presentation of dishes and thereby emphasise high quality and fresh ingredients. The high quality of dishes must be complemented by quality service and it must exceed the expectations of guests. A sommelier/wine connoisseur should be present and adjust the range of wines offered with the dishes and offer advice. The ambience is very pleasant and with the use of high-quality materials it creates an impression of exclusivity. The price is correspondingly high.

Suggested Experiences: tasting menus, menus on a special topic, foreign chef hosting, pop-up events, workshops with top chefs, foraging if it is a restaurant in the countryside, or something similar.

High-quality restaurants and other HE

This includes all providers rated with less than 15 points in the Gault & Millau Slovenia Guide. They are similar to top HE; however, their offer is less complex and complete, yet still of high quality. They offer a wide selection of international and/or local dishes, often specialising in a particular type of dishes (e.g. seafood, Chinese, vegetarian food). The service is more relaxed, the atmosphere is casual. The ambience is in line with the range of products. They offer high-quality food at an affordable price.

Suggested Experiences: typical dishes, cooking courses, tasting menus, themed dinners, etc.



Inns

Inns in Slovenia represent one of the elements of our heritage and contemporary culinary visibility, which is based on long family traditions with an emphasis on the supply of their own, local and regional dishes and beverages.

Inns are a product of the modern gastronomic visibility of Slovenia, therefore they should be marketed under a collective trademark.

Their naming is connected with their guests and above all with hospitality. The service is more relaxed, the atmosphere is casual. If possible, they bear the Gostilna Slovenija label. Inns have to meet the basic requirements and cleanliness, and must provide delicious food in general. They offer high-quality food at an affordable price.

Suggested Experiences: typical local and regional dishes, cooking courses, tasting of alcoholic and non-alcoholic beverages, visiting growers, etc.



Wine cellars

Classification according to the ranking of wines in lists, ratings from evaluations, special story, additional offer, connection to nature.

In wine cellars, you can see the cellar and the wine-making facilities, taste wines and maybe even an extra culinary feast, and you can buy crops and products. This includes wine roads and other hospitality establishments on wine roads. Wine roads include areas with several wine providers – winegrowers and wine producers who supply their own wines and some dishes. Top wine cellars are famous for top wines, great hospitality and hosts regularly accompany this with culinary treats.

Suggested Experiences: tasting in a wine cellar, picnic in nature with wine, harvesting, wine spa, etc.



Gastronomic events

There is a range of various gastronomic events and destinations in Slovenia: Brda and Wine, Izola Orange Wine, Open Kitchen, Ljubljana Wine Route, Wine and Culinary Festival, Taste of the Vipava Valley, Sladolent, Gourmet Cup, Salon Sauvignon, the Days of Poetry and Wine, Dreams in Medana, Rebula Masterclass, etc. The most important include the ones that combine top-class culinary delights with wine (roundtables, lectures, activities), where local culinary festivals (goulash, Kozjansko apple, persimmon, olive oil, Pohorje omelette, etc.) are desirable, but we should be aware that there is less international interest in them.

However, they are certainly an addition to the “Slovenian experience”, interesting for a group of interested gastronomic tourists, especially those interested in local specialties.



Range of gastronomic products at tourist farms and at food producers

For example, salting, oil production, beekeeping, cheese making, herbalism, fruit growing, gardening. The key attribute of this product is learning about the production of a particular food. Here is the greatest potential of Slovenia as a gastronomic destination. The range of products that broadens the guests' horizons to open their eyes to the ingredients that are then tasted in a restaurant, an inn and/or a tourist farm is crucial. Market visits should also be included in this group.

Suggested Experiences: picnic with local crops, pig slaughtering, animal care, visits and tours to cheese makers/Alpine dairy farmers, herbal training course, wellness with honey, wellness in salt-pans, garden visits, sightseeing, harvesting of olives, fruit, etc.



Special gastronomic experiences

They include the visitor and address all their senses. These are experiences with a distinctly Slovenian character, they are embedded in nature and in the local (cultural) environment. Slovenia is a destination that, thanks to its diversity and genuine experience, enables experiences tailored to the guest and for these it is possible to achieve a higher price on the market. Nature-related adventures include various forms of picnics, hunting, fishing, foraging (e.g. mushrooms, herbs, berries), lunches or dinners in nature (e.g. among vineyards, forest jams, national parks, etc.). There are more and more gastronomic experiences in special, unusual locations related to culture, industrial heritage or even sports infrastructure (e.g. dinner at the opera, in abandoned mines, in museums, in the oldest stables in Slovenia, dinner in a cable car, etc.). There is a great, yet quite unexploited tourist potential.



Mountain lodges

These are establishments intended for a short rest and care for mountaineers. Their ambience is simple and clean and they have a simple service or self service available. They mostly provide Slovenian dishes (jota (bean and sauerkraut soup), goulash, strudels, štruklji (rolled dumplings), žganci, etc.).

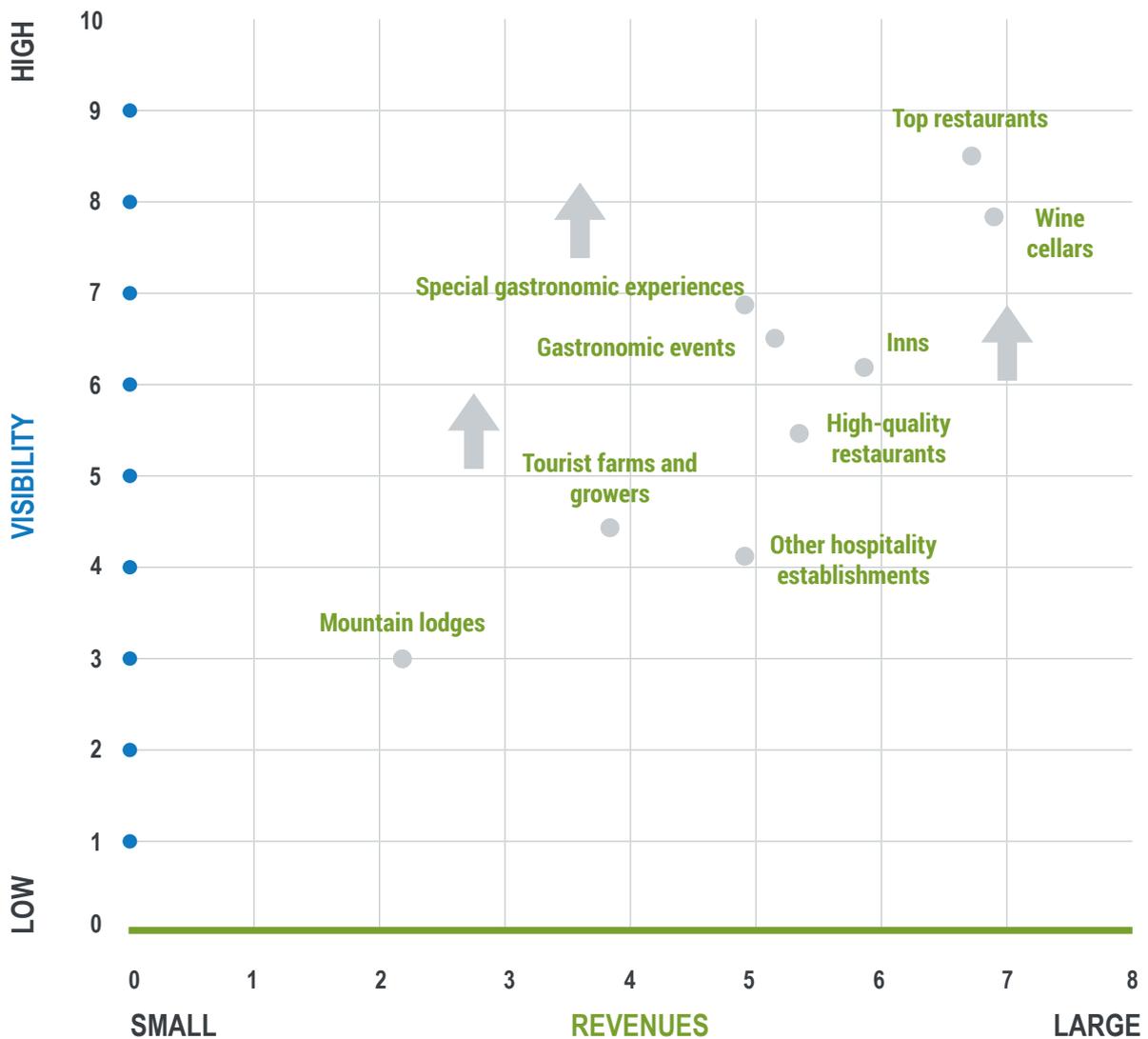
Suggested Experiences: organised excursions, sleeping in cottages, gourmet experiences according to the model Alta Badia – top chefs cooking in huts accompanied by wine providers, etc.

Other hospitality establishments

Of course, tourists also encounter the gastronomic range of products in other hospitality establishments, especially in places where they are accommodated – hotels, health resorts, camp-sites and other accommodation facilities, and they also try street food, food from stands, in buffets and the like. The offer is varied – from top-notch restaurants to simple self-service restaurants.

The picture shows the influence of individual gastronomic products on the income and visibility of Slovenia. Wine-cellars and top-class restaurants have the biggest impact on revenue and visibility. In the future, too, we want Slovenia to be best recognised as a destination with top-notch restaurants and wine cellars. In order to gain greater visibility, it is necessary to build on the segments of inns, special gastronomic experiences, tourist farms and food producers.

Presentation of the integration OF THE MAIN GASTRONOMIC PRODUCTS





Positioning strategy

What does the destination have – what are the characteristics of the provided range of products (= our advantages)

The Slovenian gastronomic range of products is relatively **evenly distributed** between top-quality restaurants and quality restaurants and inns, with the addition of wine cellars, tourist farms, mountain huts and experiences in nature, usually associated with glamping or a special/additional range of products in accommodation establishments. One of our key advantages is **the pristine nature and its diversity in a small area**, which enables fast accessibility to the exceptional richness of nature (a large quantity of resources). For the development of gastronomy and top gastronomic experiences, it is also necessary to have **premium wines** and Slovenia has internationally visible wine producers and wines (the homeland of Rebula, local and regional wines, niche natural wines). Slovenia takes very good care of **food safety** and it is therefore also recognised as a country with high standards in hygiene and sanitary standards. One of the biggest indicators of cleanliness and preservation of the natural environment is the presence of **bees** and the great tradition of beekeeping in Slovenia (it has one of the largest numbers of beekeepers per capita in the EU – one beekeeper per 200 inhabitants). The relation to nature is also reflected in the tradition and relationship of local people to the production of their own food (**gardening**) and enjoying themselves in nature (**foraging** – mushrooms, herbs, berries). In the European Union, Slovenia has protected some **agricultural products and foodstuffs with a protected designation of origin** (Tolminc cheese, Bovec cheese, Nanos cheese and Mohant, Piran fleur de sel, Kočevje forest honey and Karst honey, Istrian Prosciutto and extra virgin oil of Slovenian Istria), protected geographical indication (Carniolan sausage, Karst Prosciutto, Karst zašink (cured pork neck), Karst pancetta, Prekmurje ham, Upper Savinja Valley stuffed pork stomach, Šebrelje stuffed pork stomach, Prleška tünka, Štajerska and Prekmurje pumpkin seed oil, Ptuj lük (red onions from Ptuj), eggs from below the Kamnik mountains, Styrian hops and Slovenian honey) and **guaranteed traditional speciality** (Bela Krajina flatbread, Prekmurje gibanica (Prekmurje layer cake), Idrija Žlikrofi (Idrija dough pockets) and Slovenian potica cake (procedure in progress)). Last, but certainly not the least important, the main advantage of Slovenian gastronomy is represented by the **people** who with their **knowledge** (including international cuisine), diligence and hospitality offer a **personal approach** to tourists and due to small capacities a high degree of **boutiques**. Slovenia is also very rich with drinking **water**

and various thermal and natural mineral waters. Another yet only a partial advantage, because it is unsustainable in terms of business in the long-run, are low prices.

What do we have that is different, on which we can build our distinction from other (competitive) destinations – points of differentiation = what is unique, what can we emphasise, so that we will be able to position ourselves on the market more effectively?

Slovenia is one of the greenest countries in the world, we have an extremely large area of forests (mushrooms), an abundance of local foods, divided among different landscapes, a first-class, unspoiled honey, three wine-growing regions with several wine-growing regions and their indigenous varieties.

Our special story includes the Carniolan bee, honey, beekeeping as a symbol of preserved, unspoiled and clean nature, the right to drinking water, which is written in the Slovenian Constitution, concern for the environment, the attitude of Slovenians to nature and the characteristics of the Carniolan bee that can apply to Slovenians (resistance and diligence).

The umbrella story of Slovenia.

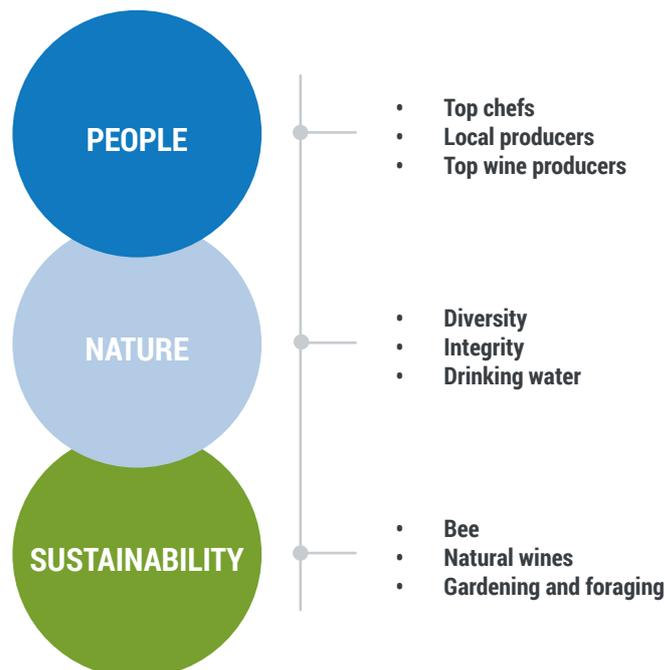
Slovenia will be positioned as a country that provides the highest amount of pristine tastes of nature in a small space; a land where honey

and wine are poured – the interweaving of three completely different climates; a country where the Mediterranean world meets the Alpine and the Pannonian worlds; the only country where three completely different wine regions with completely different wines can be found in such a small area and our wines are ranked among the best in the world and among the more sought-after among connoisseurs. **We will offer all the gastronomic experiences through the story of the greenest destination in the world and present to the guests, how much gastronomy is intertwined with the unspoiled nature, foods and resources produced in a sustainable way, in gardens, forests, meadows and pastures.**

The main advantages of Slovenian gastronomy certainly include the diversity of the gastronomic region and the rich nutritional heritage.

The possibility of sustainable farming and the production of food in an ecological and biodynamic way represents a great opportunity – such production of food is positive for the future of Slovenia in terms of protecting the environment, human health and the promotion of the region as a sustainable gastronomic region both in Europe and worldwide.

Points of distinction OF SLOVENIAN GASTRONOMY



Main gastronomic products by macrodestinations



Key products of gastronomic tourism

- Top restaurants
- Wine cellars
- Gastronomic events
- Special gastronomic experiences
- Inns
- Tourist farms and growers

Gastronomic events

- Week of Restaurants
- St Martin's Day celebrations
- Christmas and New Year's fairs with culinary offerings
- Culinary contents of Easter celebrations

Typical products and foodstuffs

Spring and mineral waters, wines from the three wine-growing regions, pumpkin seed and olive oils, forest fruits, salt and fleur de sel (flower of salt)

Typical dishes

- Carniolan sausage, sour cabbage/turnip
- Braid, Prekmurska gibanica
- Štruklji, potica
- Piran seabass, sea mussels, calamari

List of development opportunities

- Arrangement/revitalisation of wine roads
- Improved offer in mountain lodges with pop-up events
- Fishing tourism in combination with salt making
- Development of touring
- Api tourism

Key products of gastronomic tourism

- Top restaurants
- Tourist farms and growers
- Inns
- Mountain lodges
- Special gastronomic experiences

Gastronomic events

- Chocolate Festival, Radovljica
- Cow's Ball, Cheese and Wine Festival, Bohinj
- Old Vine Festival, Maribor
- Taste Radol'ca, Radovljica
- Jestival, Kobarid

Typical products and foodstuffs

Cheeses, freshwater fish, dry meat, spirits, game, beef, veal, sheep, honey, potatoes, Bohinj corn (trdinka), cheeses: mohant, Bohinj cheese, Bovec cheese, Tolminc

Typical dishes

- Pastry pockets or krapci
- Mush and porridges
- Bohinj and Soča trout
- Bled Cream Cake

List of development opportunities

- Improved offer in mountain lodges with pop-up events
- Tourism in Alpine dairy farms
- Offering natural packages – foraging, herbalism, hunting dormouse, etc.



Key products of gastronomic tourism

Top restaurants
Wine cellars
Tourist farms and growers
Inns
Special gastronomic experiences

Gastronomic events

Wine events
Cherry Festival, Dobrovo in the Goriška Brda Hills
Festival of Teran and Prosciutto, Dutovlje
Sweet Istria, Koper
Olive, Wine and Fish Festival, Izola
Fishing Festival, Izola

Typical products and foodstuffs

Sea salt and fleur de sel, olive oil, wines, fish, seafood, Karst and Istria Prosciutto, Karst gin, cherries, peaches, apricots, persimmon, Gorizia chicory

Typical dishes

Karst dried meats
"Šelinka" soup
Jota
Frika
Kobarid dumplings
Piran seabass

List of development opportunities

Fishing tourism in combination with salt-making
Development of hospitality establishments with typical fish food (on boats)
Luxury tourism based on wine tours
Wine boutique hotels



Key products of gastronomic tourism

Top restaurants
Wine cellars
Tourist farms and growers
Inns
Special gastronomic experiences

Gastronomic events

Salon Sauvignon,
the Days of Poetry and Wine in Ptuj
Marmalada Festival, The Land of Hay Racks, Šentrupert
Dödöljajada, Puconci
Kozjansko Apple Festival, Podsreda
Spring festival in the wine cellars of Svečina, Svečina

Typical products and foodstuffs

Mineral waters, pumpkins, wines, dried meat products, hops, apples, pears, pork (Krško pig), tomatoes, strawberries, mushrooms, wheat, corn, buckwheat and other cereals

Typical dishes

Prekmurje layer cake (gibanica)
Meat from tünka
The Pohorje Pot
Styrian sour soup

List of development opportunities

The development of Kozjansko – a break in nature in combination with hunting, hiking, Kozjansko apples
Promotion of pumpkin oil
Experiential fishing (rivers Krka, Kolpa)



Key products of gastronomic tourism

Top restaurants
Gastronomic events
Special gastronomic experiences
High-quality restaurants
Special gastronomic experiences

Gastronomic events

Gourmet Cup Ljubljana, Ljubljana
Open Kitchen
Ljubljana Wine Route, Ljubljana
Days of Honey, Polhov Gradec
Idrija Žlikrofi Festival, Idrija
Slovenian Wine Festival and Culinary Festival, Ljubljana
Easter Potica Festival, Otočec

Typical products and foodstuffs

Cheeses, wines, apples, plums, vegetables, spirits, freshwater fish, wild fruits, game, potatoes

Typical dishes

Beef tongue
Vodnik salad
Roasted potatoes
Beef soup with noodles
Ljubljana cottage cheese pancakes with tarragon
Savoury and sweet štruklji
Žlikrofi with bakalca (typical meat sauce)

List of development opportunities

Strengthening the bear photo hunting with bear meat
Polhanje

I FEEL
SLOVENIA

TASTE SLOVENIA

MY WAY OF SPOILING THE TASTEBUDS.

With a wide variety of local flavours, traditions and ingredients directly from the garden a new delicacy awaits you around every corner. Discover foodie heaven in Slovenia in your own special way.

#ifeelsLOVEnia
#myway

Marketing communication activities

Gastronomy is one of the key elements of our tourism and it is of key benefit to the promotion, recognisability and reputation of the country and its tourism. STB has been highlighting it in all its marketing communication activities for 22 years. In the field of gastronomy tourism, Slovenia aims to achieve greater visibility and position itself as a top-level gastronomic destination in Europe. In 2018, we won the title of the European Region of Gastronomy 2021 with a well-prepared candidacy and gastronomy will be the main communication theme of Slovenia in 2020–2021.

The growing international visibility of top Slovenian chefs and wine producers, the arrival of international guides, the rankings on The World's 50 Best Restaurants list and the title of Slovenia – European Region of Gastronomy 2021 dictate to the STB the challenge to upgrade the existing communication strategies and communication tools.

In 2019, the STB will launch a new campaign under the umbrella slogan *My way*, which will also reasonably integrate the story of Slovenian gastronomy.

Updating the website www.slovenia.info and linking it to the leading destination websites in all 4 macrodestinations

The contents of the web pages must meet the needs of loyal and interested gastronomic tourists. The contents, which are based on the positioning strategy of Slovenian gastronomy defined in this document, should be emphasised. It is necessary to define the categories of hospitality establishments/providers that Slovenia wishes to communicate on the overarching level, i.e. national and local level, as a tourist gastronomic destination, bearing in mind that these are categories that strengthen the desired national identity and successfully distinguish us from other competitive countries.

Implementation of strategy of co-branding

Results of the Identification of Market Potential study have shown that Slovenia is not visible as a gastronomic destination, as respondents do not perceive it as a destination with an abundance of gastronomic products.

Therefore, the strategy to increase the visibility of Slovenian gastronomy will be based on the strategy of co-branding,

connection of the national trademark (Okusite Slovenijo/Taste Slovenia) with world-renowned trademarks, especially in the evaluation of providers, such as Michelin, The World's 50 Best Restaurants, Gault & Millau, the European Region of Gastronomy, and it will be reasonably applied to the target group that we wish to persuade (loyal, interested, random) and the strength of the trademark in a particular market (e.g. Gault & Millau on the markets of Central Europe, Michelin predominantly in the German markets, The World's 50 Best Restaurants on the US market and Asian markets, etc.).

Creating a communication plan for the period 2019–2023

The components of the communication plan will include:

- definition of communication objectives,
- definition of communication topics or content,
- identification of key communication messages,
- definition of digital promotional channels and activities,
- definition of classic promotional channels and activities,
- plan of cooperation with foreign media and opinion leaders (study trips and other PR activities),
- content management plan (content creation, provision of image and video material),
- definition of the programme of ambassadors (icons) of Slovenian gastronomy,
- plan for the production of publications and promotional products,
- definition of key business events (specialised fairs, stock exchanges, workshops),
- organisation and hosting of specialised gastronomic events in Slovenia,
- definition of communication activities through the activities of STB representatives abroad (Austria, Italy, Germany, UK),
- definition of the evaluation of the set goals.

Creation of a two-way communication model on the route STB – leading destinations to strengthen the development and promotion of gastronomy

The message sent by the STB through its activities to the world must be understood and recognised at the local level. Everyone involved in the tourism industry needs to know

and understand it, and visitors attracted by the Slovenian gastronomic range of products must experience it as a 5-star experience. Examples of good practice that already exist in Slovenia should be identified, supported for further development and offered as an example of good practice for implementation to other destinations that have not implemented such practices yet.

In doing so, we are pursuing at least two objectives:

- the development of gastronomic experiences with a higher added value and
- immediate positive effects on the development of the region.

The activities required for the development of gastronomic experiences with a higher added value which need to be implemented at the local/regional level (LTO) are:

- Development/identification of key experiences of the region for which demanding tourists are willing to pay more.
- Establishment of a network of providers targeting the same target segment of guests (accommodation, food, wine, transport, supplementary activities – e.g. culture, recreation, etc.).
- Creation of unique ranges of products and inclusion of commercial intermediaries for their sale.
- Establishment of sales channels and connections with providers that market higher added value.
- Finding sources of financing for the investment and further development of the region in terms of preserving/creating jobs in the field of production and tourism, increasing the visibility of the destination, attracting more foreign tourists with higher purchasing power, raising the standards of tourist supply throughout the region, etc.

Initiatives/measures:

- *Definition of a gastronomic administrator at the Slovenian Tourist Board.*
- *Definition of the activities of the gastronomic administrator that exceed the previous promotional activities of the STB.*
- *Allocation of appropriate human and financial resources.*



Organisational framework

Strategy for the Sustainable Growth of Slovenian Tourism envisages ten umbrella primary thematic tourist products: Holidays in the Mountains and Outdoors, Business meetings & Events, Health & Wellness, Gastronomy, Experiencing Nature, Sun and Beach, Culture, Sports Tourism, Touring and Countryside Tourism. From the aforementioned tourist products, different organisations undertook organised development and marketing of individual thematic products, such as Business Meetings of the Slovenian Convention Bureau, Health and Well-being of Slovenian Spas Association (SSNZ) and so on. Experts note that the development of these thematic tourism products is much better than of those that lack an interested administrator.

It should also be emphasised that gastronomic products, especially with tourists, where gastronomy is a primary motive, are products with a high added value. Stakeholders in interviews and workshops demonstrate the need for a better connectedness and joint activities. The Tourism and Hospitality Chamber of Slovenia – TGZS and the Chamber of Craft and Small Business of Slovenia – OZS are organisations where most of the Slovenian hospitality businesses connect and at the same time organisations with their main activities in the field of gastronomy development.

However, the Slovene Tourist Board – STB plays the key role in the promotion and less in the development of gastronomy. In addition to promotional activities, special emphasis is placed on the development of innovativeness (within the framework of the Snovalec project) and the preparation of guidelines and incentives for the development of supply with a higher added value (the model of 5-star experiences).

In the period 2020–2021, the central communication topic of the Slovenian tourism will be the gastronomy of Slovenia. The Slovenian Tourist Board will also operate:

- as one of the key promoters of the traditional professional event Days of Slovenian Tourism, where gastronomic issues will also be highlighted;
- in the field of cooperation with the Ministry of Foreign Affairs and the Ministry of Agriculture, Forestry and Food in the contents of gastronomic diplomacy;
- in the design of tourist and gastronomic contents at the annual Strategic Forum in Bled;
- in celebrating the World Bee Day on 20 May and in promoting the development of bee-keeping tourism in cooperation with the Ministry of Agriculture, Forestry and Food and the Ministry of Culture;
- in the activities of the project Slovenia – European Region of Gastronomy 2021.

The activities listed below are under the responsibility of the STB, which, however, cooperates with other stakeholders in individual activities.

The definition of gastronomic administrator at the Slovenian Tourist Board

The main task of the gastronomic administrator is the responsibility for continuous development and promotion of Slovenian gastronomy. In the course of their work, the administrator shall create connections with professional associates within their own organisation (content-based digital marketing, communication with the professional public, research, development, innovation and European projects, coordination with the leading destinations), with local tourist organisations of leading destinations, with the administrators of other tourism products (e.g. Convention Bureau, Hiking and Biking Economic Interest Group) and sectoral organisations in the field of gastronomy (Tourism and Hospitality Chamber of Slovenia, Chamber of Craft and Small Business of Slovenia, JRE Slovenia, etc.). In addition to professionalism, the administrator must also be distinguished by their ability to create networks and connect a number of stakeholders in the field of gastronomy, who need to become acquainted with and actively contribute to the realisation of the visions,

positioning strategies and action plan for the development and marketing of Slovenia's gastronomy defined in this document.

Definition of the activities of the gastronomic administrator that exceed the previous promotional activities of the STB

As described in the Marketing section, the STB has been actively involved in the promotion of Slovenian gastronomy for more than 22 years. In line with the marketing objectives and the key indicators of success defined in this document, the administrator will carry out the following activities in addition to the connectivity role described above:

- Implementation of activities related to cooperation with various international evaluations, e.g. Michelin or Gault & Millau. The administrator's task is to take care of greater international visibility of the key gastronomy products, in particular top-notch HE (Michelin, Gault & Millau), and to establish in cooperation with Gault & Millau Slovenia, whose concept enables the expansion of evaluation categories, a long-term evaluation concept also for other gastronomic products important for Slovenian gastronomy tourism, in particular wine cellars, inns, tourist farms and local producers, and encourages further promotion of the evaluation of key skills in catering (service, knowledge of wines, etc.).
- Networking and presentations at international events that are important for the development and recognition of Slovenian gastronomy. For the visibility of Slovenia among foodies and the voters of the The World's 50 Best Restaurants, the world's most important culinary conferences include MAD (Copenhagen), Gastromasa (Istanbul), Yedi (Istanbul), Care's (Alta Badia), Ein Prosit (Tarvisio), Madrid Fusion (Madrid), Terra Madre (Turin), Ikra (Sochi), Identita Golose (Milan), World Gourmet Asia (Bangkok), Gastronomika (San Sebastian), Food on the Edge (Ireland), Omnivore (Paris), Parabere (Sweden). Firstly, Slovenian cooking talents should be encouraged to visit these events, awareness should be raised that they are important for Slovenia's own recognition and recognition. In doing so, it would be reasonable to



EUROPEAN REGION OF GASTRONOMY



Organisational framework

- connect with Anna Roš, who takes part in these events as a speaker. These events require networking, establishment and maintenance of contacts with the organisers.
 - **Implementation of activities connected with the project Slovenia – the 2021 European Region of Gastronomy.** The award of European Region of Gastronomy represents an incentive for connecting food, hospitality, tourism, culture, health and sustainable principles with the aim of promoting the economic, cultural, social and environmental development of the region. The award is not awarded to the region because of its excellent gastronomic offer, but because of the programme presented in the candidature book, due to the funds intended for candidacy, and in particular because of the region's ability to address the key focus areas as defined by the Regions of Gastronomy Platform. This is an excellent opportunity for cross-sectoral cooperation in the field of food policy, gastronomy, hospitality and tourism. Activities are carried out by project partners and the STB.
 - **Participation in the organisation and the implementation of international events in Slovenia as part of a private enterprise initiative.** A good example is the Gourmet Cup Ljubljana, where a smaller version of similar events from abroad was carried out through good organisation. Such events require the participation of several visible names from abroad. At the same time, it is necessary to draw up a media list with selected foreign journalists who will take part in a study trip across Slovenia.
 - **Design and implementation of the programme of ambassadors of gastronomy tourism.** Ambassadors of the Slovenian tourism are key to promoting the country in the professional and general public. A good example of ambassadors comes from the south west of Australia, where the local tourist office leaves its ambassadors absolute freedom and it also covers all expenses. Thus, the ambassadors provide truly top-notch experiences to such visiting journalists.
 - **Culinary diplomacy programme.** It is necessary to create a comprehensive programme for presenting Slovenia abroad as a country with a rich gastronomic tradition and excellent wines and food. This programme must include ways of presenting, locations, content and events, with which we will better represent Slovenia as a gastronomic destination. Within this, it is also necessary to create an invitation to all the state authorities to promote or organise and serve the typical Slovenian dishes and foodstuffs through the events they organise (domestic and foreign guests). The Slovenian Presidency of the EU also represents an opportunity for improving the promotion. In addition to these activities, the country and its gastronomy also need appropriate translations of gastronomic literature into the world languages, since this is an important way of shaping our international visibility.
 - **Integration with the neighbouring countries on the gastronomic tourism projects to strengthen the wider region.**
- Allocation of appropriate human and financial resources**
- For a successful implementation of the recorded activities, appropriate staffing and financial resources should be provided. The administrator must be procedurally reasonably placed in the STB organisational framework; the planned financial resources for the implementation of activities shall be defined in accordance with the STB work programme.

Provider	Action	Deadline for implementation
Legal framework		
TGZS, OZS, MKGP, MZ	<ul style="list-style-type: none"> A clearer definition of minimum quality standards in hospitality establishments, conditions for performing activities and their classification (categorisation of HE) Simplification of guidelines for good hygiene practice and the application of HACCP principles in hospitality services 	2019-2020
Competent ministries	<ul style="list-style-type: none"> Unburdening of wages in hospitality industry 	2019-2023
MGRT, MF, MDDSZ, MKGP, MOP, MP	<ul style="list-style-type: none"> Identification and removal of administrative barriers (simplification of procedures for opening an HE and for obtaining foreign workers) 	2019-2020
Trademarks and quality evaluation		
STB, MGRT	<ul style="list-style-type: none"> Introduction of the international gastronomic guide Michelin Slovenia 	2019-2020
Gault & Millau, STO, MGRT, MKGP	<ul style="list-style-type: none"> Preservation and promotion of the international gastronomic guide Gault & Millau Slovenia 	2019-2023
TGZS, STO, MGRT, MKGP	<ul style="list-style-type: none"> Conditional introduction of national evaluation system 	2022-2023
STB	<ul style="list-style-type: none"> Support to hospitality service providers to rank on The World's 50 Best Restaurants list 	2019-2023
Promotion of increasing quality		
STB, inter. organisations	<ul style="list-style-type: none"> Taste Slovenia: a reformation of the existing gastronomic pyramid and the adaptation of typical dishes according to the principle of macrodestinations 	2019
Project team	<ul style="list-style-type: none"> Activities and all projects of the European gastronomic region as an umbrella development project 	2019-2021
TGZS, OZS, MKGP	<ul style="list-style-type: none"> Encouraging local producers and producers of protected products, wines and spirits to sell top-quality crops and quality HE 	2019-2023
STB, OZS, TGZS	<ul style="list-style-type: none"> Further development of the brand Gostilna Slovenija 	2019-2020
TGZS, OZS	<ul style="list-style-type: none"> Assistance in applying projects for EU funds 	2019-2023
TGZS, educational institutions, tourist	<ul style="list-style-type: none"> SRIPT Activities 	2019-2023

Review of strategic priorities

Provider	Action	Deadline for implementation
Education		
TGZS, educ. instit., tourist., comp. min.	<ul style="list-style-type: none"> Improvements to the education system System of paid apprenticeship and paid mentoring with the best chefs in Slovenia Permanent training at the HT Academy and other educational organisations. Promotion and popularisation of vocations in hospitality industry Raising awareness of providers for increasing quality of supply and projects in this area (Taste Slovenia, Gostilna Slovenije) Promoting local foods and resources and spreading knowledge about the use Raising awareness among young people about the nutrition culture and the richness of local foodstuffs, protected foodstuffs, wines and spirits through the housekeeping lessons in kindergartens and elementary schools International exchange of chefs, organisation of workshops and academies of renowned foreign chefs in Slovenia and guest performances of renowned chefs in Slovenia (Pop-up Chef). 	2019-2023
Marketing		
STB	<ul style="list-style-type: none"> Definition of Slovenia's vision of a gastronomy tourism destination Definition of marketing goals Definition of target groups Definition of markets Definition of major gastronomic products Definition of Slovenia's position strategy as a gastronomy tourism destination Definition of the main tourist gastronomic products by macrodestinations Definition of market communication 	2019
		2019-2023
Market communication		
STB	<ul style="list-style-type: none"> Updating the website slovenia.info and establishing a link with the websites of leading destinations in all 4 macrodestinations 	2020-2021
STB	<ul style="list-style-type: none"> Implementation of the strategy of co-branding 	2020-2023
STO	<ul style="list-style-type: none"> Creating a communication plan for the period 2019–2023 	2019
STB	<ul style="list-style-type: none"> Creation of a two-way communication model on the route STB - leading destinations to strengthen the development and promotion of gastronomy 	2023
Organisation framework		
STB	<ul style="list-style-type: none"> Definition of STB gastronomic administrator Definition of the activities of the gastronomic administrator that exceed the previous promotional 	2019
STO, MGRT	<ul style="list-style-type: none"> Allocation of appropriate human and financial resources 	2019-2023

Evaluation

At present, we do not measure the impact of gastronomy tourism, except in major SURS and Valicon surveys. In line with the implementation of this document, continuous monitoring of key performance indicators and the implementation of set initiatives/measures should be ensured. For this purpose, we propose biannual meetings of the client, the expert committee and authors of this document in order to review the realisation of initiatives/measures. At these meetings, the achievement of the key performance indicators is presented annually, for which the STB prepares a short report.

Once the activities from this Action Plan begin to be implemented, the effects of the development and marketing of gastronomy tourism should also be measured through the following indicators:

- increase in the expenditure in hospitality establishments (source: Survey on foreign tourists carried out by SURS every two years),
- impact of gastronomy on the satisfaction of tourists (there is currently no source, it is possible to produce an analysis of guest ratings on web portals or to conduct a survey),
- the number of companies included in the initiatives / measures of this Action Plan (the source includes the operators of activities – STB, MGRT, TGIS, OZS and others),
- key indicators of business performance in hospitality industry (sources include AJPES, TGZS and this analysis is carried out once a year),
- reduction of the gap between the perceived and recognised quality of Slovenian gastronomy (source: Identification of market potential survey or a related survey, every 3 years, STB).



Work methodology

Finally, we present the working methodology in the document. The preparation of the document consisted of several phases, in order to thoroughly examine how the present and the future development of gastronomy are seen by the key stakeholders.

In all phases, we cooperated closely with the expert group, where the STB managed to gather the most prominent representatives of the gastronomic profession in Slovenia, which are presented at the beginning of the

Through interviews and workshops we got the main orientation on how to eliminate the regulatory obstacles, how to better develop and educate personnel, how to better organise providers and, above all, how to better market in the international market with three main objectives – improved international visibility, more sustainable development of gastronomy and achievement of higher added value.

1st PHASE

Determination of methodology and document framework

Determination of the working method

Expert Committee

31 August 2018

2nd PHASE

Preparation of the draft

Survey of the content

Interviews with the selected providers with international experience

Expert Committee

28 September 2018

3rd PHASE

Formatting of the final version of the document

Verification of content

Workshops with stakeholders (gastronomy providers, LTO, educational institutions, tourist agencies)

Expert committee

26 January 2018

Work methodology

Questions for Slovene interviewers: we used the method of a semi-structured interview. We asked the interviewers:

1. How do you see Slovenian gastronomy? Its current development and future prospects.
2. What national projects do you know (Tastes of Slovenia, Gostilna Slovenije, European Region of Gastronomy, etc.)? How do you rate them?
3. What are the most important organisations in this field at home and abroad?
4. What are the main advantages of Slovenia's gastronomy?
5. What are the main disadvantages?
6. What are Slovenia's competitive destinations for gastronomy tourism?
7. Which legislation is most inhibiting the development of the industry?
8. What do you think of a Gastronomic Office?
9. What evaluations and quality schemes do you value? What should we have in Slovenia?
10. How can we better promote the quality of Slovenia's gastronomy?
11. In Slovenia (and abroad) there is a huge shortage of personnel. How can this problem be solved? Is the solution in different opening hours?
12. What else can the state do for the providers?
13. How can the providers perform better?
14. How to better promote Slovenia as a gastronomic/wine destination?
15. What are the main products of Slovenia as a gastronomic/wine destination?
16. What is the USP of Slovenia as a gastronomic/wine destination?
17. What promotional tools would be the most effective?
18. Where, in what projects would you allocate more resources to make the development of gastronomic destinations more successful?
19. Do you think that Slovenia is a gastronomic destination? Justify.
20. How to better train staff?

Questions for foreign interviewers: we used the method of a semi-structured interview. We asked the interviewees:

1. When you think of Slovenia, what are your first associations? Do you see it as a gastronomic destination?
2. What would you say are destinations comparable to Slovenia in terms of development of gastronomic tourism, potential, general offer ... Which countries are our main competition?
3. What would you say are top gastronomic destinations? What makes them so strong?
4. In your view, what are the main advantages and main disadvantages of Slovenia (in terms of gastronomic destination)?
5. What would you suggest is absolutely essential to change/upgrade/improve in order for us to become gastronomic destination?
6. Do you know any successful, useful, positive practices from abroad of encouraging the development of gastronomic destination?
7. Follow up question: What is the most effective way of promoting what we have? Press trips? Building up on titles like "European gastronomic destination", inviting foreign chefs, more visibility on foreign markets (ads etc.)?
8. When you think back on your Slovenia's visit, what pops up immediately that's unique?
9. If Slovenia didn't have Ana Roš and you're a foodie tourist, would you feel that it's still worth a visit?
10. What did you miss during your trip? Why would you want to come back?

Workshops

Workshops were conducted at the following locations:

- Ljubljana, 12. 10. 2018,
- Maribor, 15. 10. 2018,
- Portorož, 16. 10. 2018,
- Bled, 17. 10. 2018.

The following representatives were invited to the workshops:

- LTO/RDO,
- local communities,
- gastronomy providers (hospitality service providers, wine producers, bee-keepers),
- educational and advisory organisations.

In total, 81 invited representatives from different organisations participated in the workshops.

Interviews as a method were selected to obtain more detailed information on individual areas and they were not required by the contracting authority. Interviewees were selected in compliance with the criteria of international visibility and/or activities abroad at the request of the contractor. We used the method of a semi-structured interview, which means that only part of the questions was formulated in advance.

FOREIGN JOURNALISTS

Georges Desrues, Italy
Anders Husa, Norway
Nichollas Gill, USA, active in South America
Andrea Petrini, Italy, France
Hrvoje Petrič, Croatia
Marko Kovač, Croatia, active in Europe and USA
Mason Florence, USA, active in Asia
Simon Woolf
Andras Jokuti, Hungary

DOMESTIC JOURNALISTS/OPINION LEADERS

Mira Šemić
Jure Gašperšič
Primož Štajer
Tomaž Sršen
Maja Roy
Andreja Lajh

HOSPITALITY SERVICE PROVIDERS/WINE PRODUCERS

Thermal Pannonian Slovenia:

Grega Denk
Jure Tomič
Robert Gorjak
Istenič
Slapšak/Šuklje
Alpine Slovenia:
Gašper Čarman
Ana Roš + Valter Kramar
Uroš Štefelin (came to a workshop)

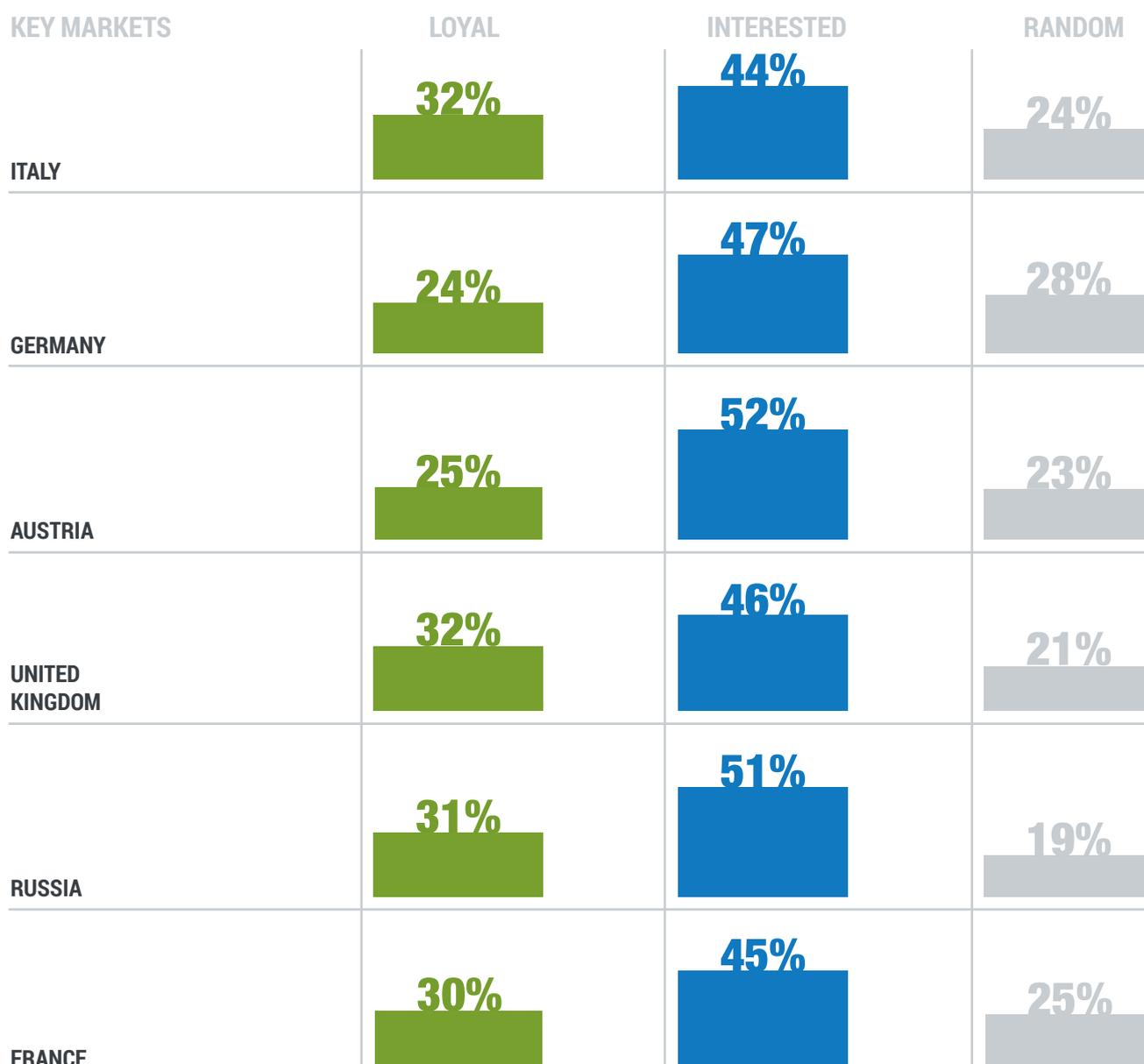
Mediterranean & Karst Slovenia:

Joško Sirk
Tomaž Kavčič
Uroš Fakuč
Matej Lavrenčič
Kabaj
Movia
Klinec
Burja
Aleks Simčič
Marjan Simčič

Ljubljana & Central Slovenia:

Bine Volčič
Igor Jagodic
Luka Košir
Jakob Pintar

Appendix: Structure and size of gastronomy tourism market



Vir: obdelava avtorjev po podatkih Valicon in SURS.

In all the observed markets, the segment of interested gastronomic tourists prevails.

