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## **Wine tourism in Slovenia**

Exploring international wine tourism in Slovenia through Porter's diamond  
framework

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**ABSTRACT:**

Wine tourism has emerged as a quickly growing niche in global tourism. This growth is driven by increasing demand for experiential, authentic and sustainable travel. This thesis examines the competitive advantages of Slovenian wine tourism from an international business perspective. The aim of the study is to identify competitive advantages of Slovenian wine tourism internationally as the Porter's diamond model is applied as the primary analytical framework. Additionally the study aims to identify which elements of the diamond are the most influential for international wine tourism competitiveness.

The study follows a qualitative research method. First a preliminary analysis/assumption based on secondary sources and literature was conducted for each element of the Porter's diamond. These assumptions were refined and expanded through three semi-structured email interviews with Slovenian wineries. The thesis combines wine tourism literature with international business theories, out of which Resource-Based View and institutional theory were particularly utilized.

Based on interviewed wineries and secondary sources, the findings suggest that Slovenia's strongest competitive advantages lie in its factor conditions and firm strategy, structure and rivalry. The country benefits from its easy accessibility, diverse landscapes and strong alignment with tourism trends of sustainability and experiential travel. Wineries in Slovenia have developed a competitive differentiation where they have positioned themselves as boutique and authentic, with strong emphasis on experience and high-quality hospitality. However in terms of related and supporting industries, the study identifies clear weaknesses, with fragmented cooperation and limited coordination between stakeholders such as wineries, public institutions, restaurants and tourism organizations.

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**KEYWORDS:** wine tourism, Porter's diamond model, competitiveness, Slovenia, sustainability

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## Abbreviations

IB = International Business  
 PDM = Porter's diamond model  
 RBV = Resource-Based View  
 sw = seasonal workers

# 1 Introduction

The introduction will cover (in order) theoretical framework, research question and objectives, preliminary assumption and justification of the study. Lastly the study's structure will be provided.

## 1.1 Theoretical framework

Wine tourism has come up as a quickly growing niche in global tourism (Montella, 2017). It is characterized by experiential consumption, cultural authenticity and sustainability (Hall et al., 2000; Carlsen & Charters, 2006). From international business perspective role of experience, destination branding and integration with local stakeholders is that they all are differentiation strategies.

United Nations Tourism (2024) reported that global tourism level has risen past 2019 (before covid-19) in terms of international travel days and spending. In Slovenia's case, the same trend can be seen as the country has constantly grown its tourism sector with world famous locations like Lake Bled and the capital city of Ljubljana being the country's hotspots for international and local tourism (Slovenian Tourist Board, 2025). With growing tourism numbers the country has taken initiative to brand themselves as boutique, green and diverse in hopes of attracting more tourists into the country (Slovenian Tourist Board, n.d).

IB literature on SME competitiveness demonstrates how smaller companies can compete against through differentiation and niche positioning (Galli-Debicella, 2021). This aligns with Resource-Based View which emphasizes that sustainable competitive advantage stems from company-specific resources that are valuable, rare, inimitable and non-substitutable (VRIN) (Barney, 1991). For Slovenian wineries the mentioned resources could include for example terroir specific wines, family heritage, personalized experience and authenticity that competition with bigger volumes cannot replicate, as Slovenia is a comparatively smaller market in Europe's wine tourism market.

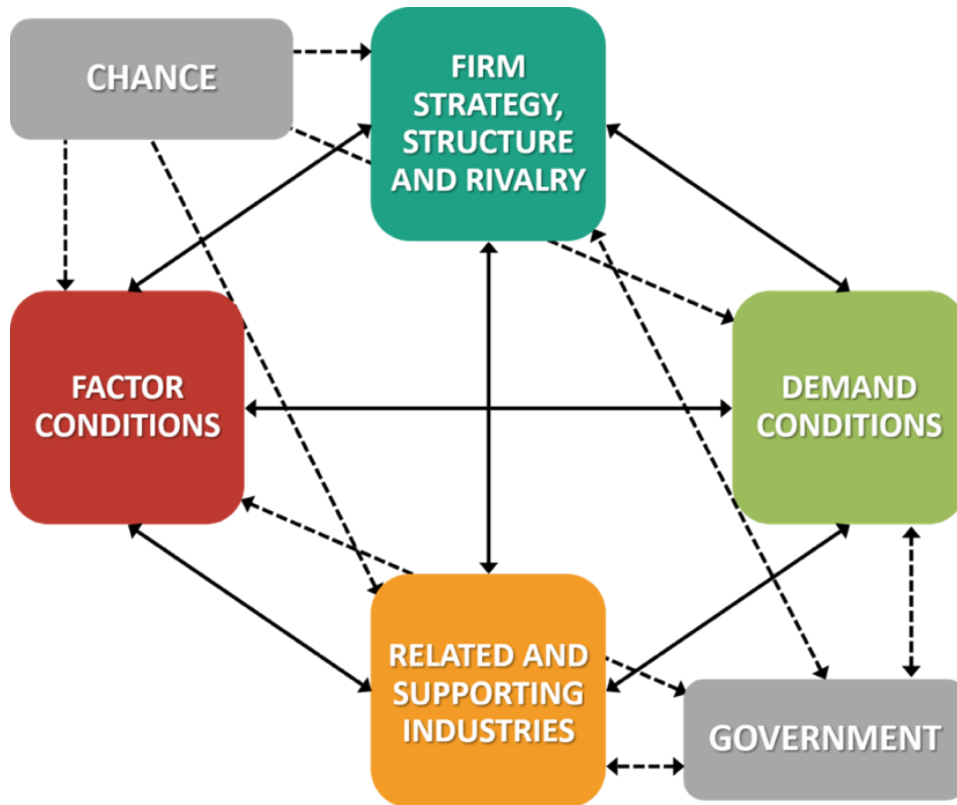
Another IB theory which will be occurring through the study is institutional theory. It examines how formal institutional and informal institutions, such as cultural norms and industry practices, shape company behaviour and competitive outcomes (Di Maggio & Powell, 1983; Scott, 2008). For example Lavandoski et al (2016) utilized this theory in the study of wine tourism development in Portugal. In this study's context, with small open economies the institutional conditions can either enable or hinder Slovenian wineries' competition in international wine tourism market.

As Slovenia is a relatively small country – both in size and population – and a small wine tourism market for international wine tourism, it can be difficult to assess the country's potential competitive advantages without a structured framework. **Porter's diamond framework** gives a backbone and a systematic way to analyze how factor conditions, demand conditions, related and supporting industries, firm strategy and rivalry, as well as government and chance, help shape the success of a sector within the global economy (Porter, 1990).

Ingrassia et al (2026) highlighted that Italy is the world's largest wine producer and has around 14 million wine tourists visiting the country annually. For Slovenia, having such a big "player" as neighbour calls for acknowledgement of the competitive advantages that the country has. These advantages can be vital for the country to recognize, as competition is has more volume and size. Because of this competitive advantage must be gained through differentiation and/or niche positioning, which is a pattern that small countries use in internationalization (Donnelly, 2013).

However, as the PDM was originally designed to explain how nations or regions can achieve competitive advantage, with the main industries being manufacturing and different industrial sectors, it has some limitations and application differences that need to be addressed (Porter, 1990). Two non-primary factors, which will also be included in

the thesis do not need adaptation, because chance and government aspects are a standard in each case.



**Figure 1:** Porter's diamond model (Source: Porter, 1990)

**Table 1:** Porter's diamond model adaptations

Diamond element	Original model	Adaptation to wine tourism
Factor conditions	Materials, labour costs	Climate, labour skill, accessibility, landscape
Demand conditions	Domestic buyers and their habits	International buyers, their habits and expectations
Related and supporting industries (complementing industries)	Supply chains	Partnerships

Firm structure, strategy and rivalry	Differentiation in pricing and efficiency	Differentiation in experience and service
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Studies have implemented Porter's diamond framework to tourism and different sectors in different countries with convincing results. Estevão et al (2018) studied Portugal's competitive advantages through Porter's diamond and Tiwari et al (2023), applied the model to tea tourism in India and Sri Lanka. Both studies found very similar results in their respective fields (Estevão et al, 2018; Tiwari et al, 2023). The studies suggested that all related and supporting industries were the most crucial factors in competitive advantage for tourism and that more demanding tourists develop better services with diverse options (Estevão et al, 2018; Tiwari et al, 2023). Additionally the study on tea tourism highlights that the diamond model can be applied to a niche sector of tourism, which supports the validity and credibility of this study.

Since Slovenian wine tourism presents a clustered industry (similarly to the Indian and Sri Lankan tea tourism) with multiple connected factors such as wineries, restaurants, hospitality businesses, hotels and tourism institutions, the application of the diamond model fits this setting. By combining findings from international tourism studies with Porter's framework, this master's thesis creates an approach for evaluating Slovenia's competitive advantages in wine tourism and identifying strategies to strengthen its global positioning and competitiveness.

Theoretical framework of this thesis is structured in two complementary parts. Firstly, it draws on wine tourism literature to contextualize the study within tourism research. Studies highlight that wine tourism is not just about wine tasting, but rather about experiential value, cultural authenticity and destination identity (Hall et al., 2000; Getz & Brown, 2006).

Secondly, the thesis applies Porter's Diamond Model (Porter, 1990) as the main analytical tool for evaluating Slovenia's competitive advantages in wine tourism. The diamond framework is widely used in international business and it enables a structured assessment of how resources, demand, supporting industries, and firm strategy interact to shape an industry's competitiveness in a global setting. By integrating tourism theories with an international business perspective, this thesis provides a novel approach to understanding the opportunities and challenges of Slovenian wine tourism.

In addition the study is reflecting on broader international business theories, particularly Resource-Based-View, institutional theory as well as cluster theory and differentiation. These theories are used to explain Slovenian wineries' competitive advantages in international wine tourism market.

In this study, Porter's Diamond Model is used as the primary analytical framework for examining the competitive advantages of Slovenian wine tourism. Wine tourism will be integrated to the framework with the aim of seeking competitive advantages of the country's wine tourism sector. The model is first introduced in the theoretical framework, where each element of the diamond is discussed conceptually. Based on secondary data and existing literature, preliminary assumptions are formulated for each element, outlining potential areas of competitive advantage and limitation.

These assumptions serve as a guiding structure for the empirical research. The full Porter's Diamond for Slovenian wine tourism is then developed in the findings and discussion section, where the analytical assumptions are refined and expanded through qualitative insights gathered from interviews with local wineries from the country's three wine regions. This approach ensures that the analysis is theoretically grounded and empirically valid.

## 1.2 Justification for the study

Wine tourism is a relatively new field of study in the academic world, with most of its literature emerging in the 21st century. Because of the recency of wine tourism studies, compared to other forms of tourism, it has not been researched as extensively.

For service based industries, Porter's diamond framework is not as commonly used as it was not originally designed for the service based industries (Porter, 1990). With Tiwari et al (2023) providing evidence that Porter's diamond can be applied to a very niche sector of tourism, it also enables and gives more credibility for the usage of the model in this research (Tiwari et al, 2023). In the context of Porter's Diamond Model, wine tourism has an even more limited study history, with only a few studies applying the model to this niche sector, such as Chong, 2017, who applied the model to Thailand's wine tourism (Chong, 2017).

With wine tourism becoming more and more popular and the wine tourism fitting with Slovenia's tourism branding, it makes Slovenian wine tourism a relevant topic to study further. Additionally as the wine tourism industry has not yet been studied much, with academic literature starting in the 1990's and same applies for Slovenian wine tourism, which has had limited research.

Out of studies about Slovenian wine tourism, Kerma & Gacnik (2015) and Jurinčić, I., & Bojnec, Š. (2009) doing the more extensive research on Primorska wine region, highlighting the missing literature and study on the two other wine regions in the country. These studies also leave gaps on firm-level perspective, institutional coordination and firm cooperation.

This study aims to address these gaps by applying Porter's diamond as a structured tool to analyze what elements are most valuable, what elements need to be improved and what elements interact with one another. It is also important to note that Slovenia has been an independent country since 1991 after it separated from Yugoslavia. The age of

the country could be an additional reason why there has not been a lot of study on the country's wine tourism.

Additionally, for Slovenian wineries themselves there may be a need for more research. The neighbouring countries such as Italy and Austria are much more known for their wines, so in order to grow wine tourism in Slovenia it would be fundamental to know what are the country's competitive advantages and how they could be utilized. Therefore, there is a clear research gap for examining Slovenian wine tourism from an international perspective. As mentioned, the findings of the study may also highlight importance of some factors for the wineries and provide key points to help the local wineries grow their wine tourism business internationally.

### **1.3 Research questions and objectives**

The study examines Slovenian wine tourism as an industry, and uses wineries' perspectives as the main empirical source. The study will be limited to activities that happen at the vineyards; cellar door visits, tastings and other wine related activities. For this study's purpose wine tourists are classified as either people who have travelled to Slovenia for wine or people who have travelled to Slovenia for other purposes, but also visit vineyards.

First a preliminary analysis is developed for each part of the diamond model (factor, demand, related and supporting industries, firm strategy, government, chance), based on existing literature and secondary data. The gathered information will then be formed into an analytical assumption for the study. After this qualitative interviews will be conducted with Slovenian wineries and professionals working within the industry to get their insights and perspectives on each part of the diamond. The interviews will be used to refine, test and expand on the original assumptions. Lastly the study gives an updated version of the Porter's diamond model that presents the Slovenian wine tourism industry.

The outcome of the study aims to give insights on what are the pros and cons that the Slovenian international wine tourism currently has. In addition the study aims to enable the country to notice its potential in wine tourism industry, with pointing out Slovenia's competitive advantages over other wine producing countries, in the competitive European wine tourism market.

**Objective of the thesis:**

- *Analyze competitive advantages of Slovenian wine tourism internationally, using Porter's diamond model*

**Research questions of the thesis:**

- *What are the competitive advantages of Slovenian wine tourism that the Porter's diamond highlights*
- *What are the most influential elements of Porter's diamond for Slovenia's competitiveness as an international wine tourism destination*

## **1.4 Key concepts and definitions**

**Clusters** are concentrations of interconnected companies and businesses in a particular field that are located geographically close to one another (Porter, 1990). In Slovenia **wine clusters** appear in all three wine regions with hospitality services, restaurants and recreational activities.

Hall et al., 2000 have defined **wine tourism** as follows: "Visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors" (Hall, et al., 2000). Another popular definition comes from Carlsen & Charters (2006): "Wine tourism has emerged as a growing area of interest for both the wine and tourism industries and has become a distinct form of special interest tourism that combines elements of education, culture, and leisure". They add that wine tourism can be viewed as one of the branches in agrotourism (Carlsen & Charters, 2006).

**Wine trail** is described by Gatti and Incerti (1997) as “a sign-posted itinerary, through a limited area (region, province, denomination area) whose aim is the discovery of the wine(s) product(s) in the region and the activities which are associated with it (Gatti and Incerti, 1997).

**Porter’s diamond** is a framework that was developed by Michael Porter in 1990. The idea of the framework is to showcase how some industries in certain countries could get and keep a competitive advantage over others (Porter, 1990). The four primary factors of the Porter’s diamond are

1. **Factor conditions:** *“The nation’s position in factors of production, such as skilled labor or infrastructure, necessary to compete in a given industry”* (Porter, 1990).
2. **Demand conditions:** *“The nature of home-market demand for the industry’s product or service”* (Porter, 1990).
3. **Related and supporting industries:** *“The presence or absence in the nation of supplier industries and other related industries that are internationally competitive”* (Porter, 1990)
4. **Firm strategy, structure and rivalry:** *“The conditions in the nation governing how companies are created, organized, and managed, as well as the nature of domestic rivalry”* (Porter, 1990)

Porter also included two non-primary factors which are:

5. **Government:** The government can act as a catalyst, creating policies, regulations and investing in infrastructure (Porter, 1990).
6. **Chance:** Unpredictable events can either slow or accelerate competitiveness (Porter, 1990).

## 1.5 Theoretical positioning

This master’s thesis is positioned in the crossing of international business and tourism studies, with International business theory being the main analytical point of view. This study aims to examine wine tourism as an industry that is competing for a market share

globally, but more specifically in Europe. The three main adaptations of the Porter's diamond model were presented in Table 1. The study adopts industry competitiveness point of view, not destination brand or firm-level strategy. The diamond model is applied to view how Slovenia's wine tourism sector as an industry can achieve competitive advantage in European wine tourism market.

## **1.6 Structure of the study**

The introduction goes over the theoretical framework, justification of the study, research questions and objectives, key concepts and the structure. This is followed by a chapter that takes a deeper look into wine tourism, going over topics like success factors of wine tourism and economic impacts of wine tourism. The final subchapter takes the study more towards Slovenia's wine tourism industry and presents the country's wine industry.

In the third chapter the study will briefly explain the Porter's diamond model and furthermore discuss its usage within the service industry. After this the model will be applied to Slovenian wine tourism, with all the elements of the diamond being covered based on secondary sources. The fourth chapter will go over the research methodology, which includes research design, data collection and analysis and reliability and validity. In the fifth chapter the study dives into the material gathered from the interviews and analyses them. The last chapter discusses the study's results and concludes the thesis. Additionally the preliminary assumption is being reformed and tested in the last chapter.

## 2 Wine tourism

In this chapter the study will take a brief look at the history of wine tourism studies and how the industry has developed over the past decades. This chapter will also cover the concept of wine tourists, wine routes and how global tourism trends affect the wine tourism industry, while mirroring these themes in to Slovenian wineries and IB theories. How the following chapters and themes can be linked to different parts of the Porter's diamond is also discussed. Lastly the study looks at the economic impacts of wine tourism and proceeds to go over the Slovenian wine industry and the country's wine tourism.

### 2.1 Global development of wine tourism

Interest towards wine tourism has grown steadily over the past two decades with tourism industry's growth being the main factor in the research. Grand View Research suggests that the wine tourism industry could double its market size by 2030 to around 106 billion dollars, with an annual growth of 12,9 % from 2024 to 2030. The growth estimates are based on the upward trend, that the industry has experienced since 2010s (Grand View Research, 2023).

According to Tsetskhladze & Osadze (2024), the first wine tourism conference was held in Australia in 1998, after which the majority of the studies on wine tourism began. Additionally they mention the importance of the conference for rural development, even referencing to being the driver of rural development in some cases (Tsetskhladze & Osadze, 2024). The United Nations World Tourism Organization (UNWTO) organized the first UNWTO Global Conference on Wine Tourism in Georgia in 2016 after which they published the Declaration of Georgia on Wine Tourism. It marks a framework for wine tourism within the institutional setting of the UNWTO. It also recognizes wine tourism as part of cultural tourism and gastronomy (United Nations Tourism, 2024). This highlights how *related and supporting industries* of the Porter's diamond is applied to wine tourism and how UN has marked these as industries intertwined.

From wineries' perspective wine tourism can be challenging to integrate since it combines two vastly different operational settings; wine making which is mostly agriculture based on production and processing, and tourism which is service and hospitality based sector (Carlsen & Charters, 2006). Getz et al. (2004) present a case where a vegetable farm turned itself into a vineyard with a bistro, wine tours and accommodation. They reported that almost 80% of the turnover was from tourism, highlighting the potential profits if and when the integration is done successfully (Getz et al, 2004, p.155-157).

In Europe the most popular locations for wine tourism according to Romano & Natilli (2009) and Sorrane et al (2018) are the areas of Bordeaux in France and Tuscany in Italy (Romano & Natilli, 2009; Sorrano et al., 2018). As mentioned in chapter 1, having such a popular wine tourism country as a neighbour can be challenging, but it could also affect competition positively with tourists being more demanding, whilst improving the *demand conditions*.

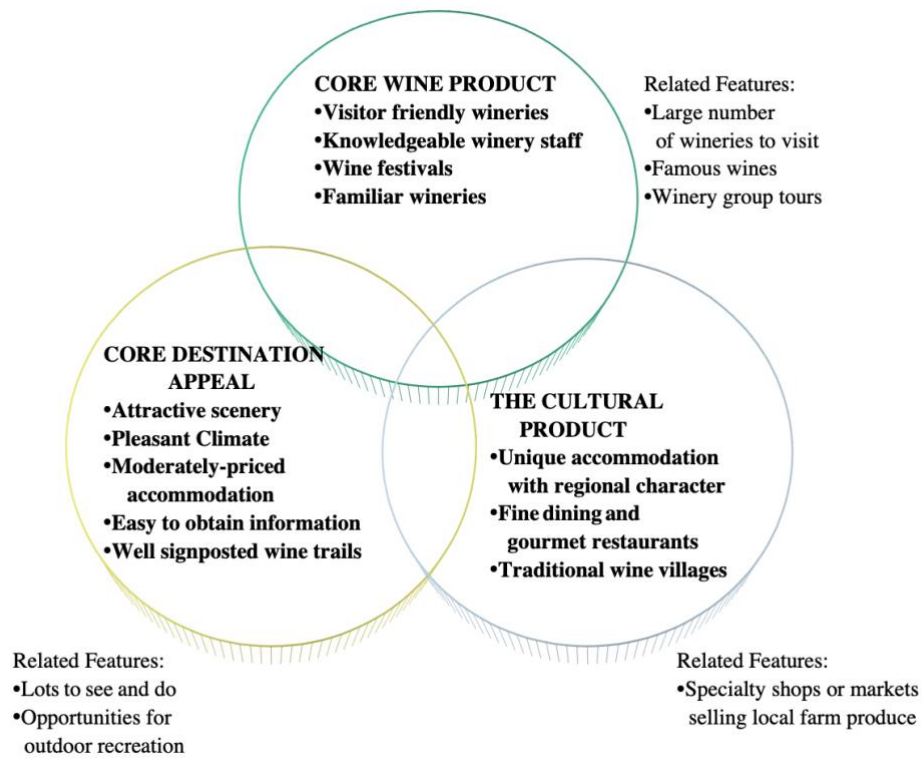
Trišić et al. (2020) stated that wine tourism has been quickly integrated as a part of the global tourism. The study highlights that the development has been more rapid in "New World" countries such as South Africa, USA and Australia compared to the "Old World" countries in Europe like Italy, France and Spain (Trišić et al., 2020). The development of New World wine tourism can offer valuable strategic lessons for Slovenia, as destination like Napa Valley has built competitiveness through aggressive destination branding and focus on experience, which compensates for lack of historical reputation. Geographically Slovenia is a part of Old World, but without the brand recognition or history. This would suggest a hybrid strategy where European (Old World) authenticity is mixed with New World experiential innovation.

## **2.2 Success factors and challenges in wine tourism**

Getz & Brown (2006) studied what are the most important factors for wine tourists to experience during their wine tasting/cellar door visit/wine travel. What they found was

that there was three main factors being wine product, destination appeal and cultural Product (Figure 2). In terms of wine the important aspects were to have friendly and knowledgeable wineries with familiar/famous wines. For destination the highly appreciated traits were attractive scenery, pleasant climate, good accommodation prices together with easily attainable information. Culturally they wanted uniqueness together with traditional local setting (Getz & Brown, 2006).

As Kerma (2012) mentions that Slovenia is a relatively unknown as wine tourism destination, they can have harder time competing with famous wines (Kerma, 2012). Because of this, competing with good service, pleasant scenery and lower prices compared to other international wine tourism countries could be a more efficient strategy. In Porter's diamond the emphasis on these aspects would be on *factor conditions* and *firm structure, strategy and rivalry*. While more international wine tourist visit the country, the wines could also get more international recognition.



**Figure 2:** Critical features of the wine tourism experience from the consumer perspective (Source: Getz & Brown, 2006)

An example where these factors have not been fulfilled comes from Chile where wine tourism has not been as successful as the country's wine exports. According to Hojman & Hunter-Jones (2012) there are multitude of reasons why wine tourism does not thrive in the country (Hojman & Hunter-Jones, 2012). Firstly they highlight that Chile does not have enough differentiation when it comes to wines and is geographically far away. In addition, the distance of wineries from the capital Santiago, which has the biggest international airport, is very challenging. Also wineries have not been too keen on making cohesive efforts on joining wine trails, which are crucial to wine tourism.

Despite this, a Chilean wine region called Colchagua was the only standout with a highly successful wine route on Chilean standards. The region ticks the boxes of having good hotels and restaurants to supplement the wineries, attractive scenery with beaches and wines that people are familiar with (Hojman & Hunter-Jones, 2012). This highlights how big of a factor *demand conditions* can be in wine tourism, since a higher demand creates

better service, as pointed out by Estevão et al, (2018) in their study of the Portuguese tourism through Porter's diamond.

### **2.3 Wine tourists & routes**

Wine tourist segmentation has evolved from its early demographic profiles, where income and education were emphasized (Charters & Ali-Knight, 2002), to more nuanced segments which are based on behaviour and motivation. Colombini (2015), divided wine tourists into four segments ranging from casual tourists to oenophiles (a wine connoisseur). He suggested that wineries need to differentiate what they offer based on these segments.

In Slovenia's case, targeting the segments which are not served in Italy, such as young travellers or casual tourists, could be beneficial, since it offers a greater potential market. This backed by Dias et al (2023), who suggested that wine tourists are getting younger. Additionally competing from oenophiles with Italy or France is likely much harder since they are loyal to more traditional wine countries and they have less appeal for trying something new.

For wine tourists different wine routes/trails serve an important purpose in getting to know different wine regions and wineries. They not only cater to tourists, but they are also viewed as an important facilitator for the local businesses and the local economy (Trišić et al., 2020; Bruwer, 2003). A wine trail does not have a clear definition but, they typically consist of concentrations of wineries with coordinated marketing, signage and route infrastructure. The goal is to facilitate visitations and tourism in the area (Bruwer, 2003; Kerma, 2012; Gatti & Incerti, 1997).

For reference Italy has around 170 wine routes (Strade del Vino) around the country, which serve the annual 4-6 million wine tourists (Colombini, 2015). For comparison, Slovenia has over 20 wine trails across its three wine regions (Slovenian Tourist Board, 2025). Through the lens of Porter's diamond wine trails are included at least in *factor*

*conditions, firm strategy, structure & rivalry and related and supporting industries*, binding all the three factors together. Having effective wine routes that cater for tourists' needs could improve Slovenia's attractiveness for international wine tourists. Once again competing with not the volume, but the quality and service on these wine routes.

## **2.4 Global wine tourism trends**

As wine tourism is a part of global tourism, different global traveling trends are directly affecting the industry (Trišić et al., 2020). Already in 1999 Pine & Gilmore (1999) argued that consumers are looking for experiences rather than just a product which highlights the importance of interactions, education and immersive experiences (Pine & Gilmore, 1999). Emphasizing this trend is the fact that in recent years experiential economy has been viewed as driving factor for tourism, which directly supports wine tourism, since it is a part of experiential tourism segment (Tsetskhladze & Osadze, 2024). The growth of experiential tourism is highlighted even more with an example from Italy where wine tourism's annual growth far exceeded international tourism growth (Colombini, 2015).

Slovenian vineyards offer multitude of possibilities to experience wine in more than one way, whether it would be taking part in harvesting, staying in a boutique hotel or fine-dining in a Michelin star restaurant near the vineyard (Slovenian Tourist Board, 2025).

Another trend that is directly effecting wine tourism is the demand for sustainable travel options and sustainable tourism. In the 21<sup>st</sup> century this trend has become ever more important for tourists (UNWTO, 2019). In the 8<sup>th</sup> United Nations wine tourism conference held in 2024, sustainability was marked as one of the key components of wine tourism and it is also tied to United Nation's Sustainable Development Goals (SDG) (UN Tourism, 2024). As Slovenia is advertised as clean and green, with multiple sustainable wineries and tourism options, it has large potential to grow along with this trend, if for example branding and marketing is more emphasized towards local wineries. Vázquez Vicente et al. (2021) mention that the relationship between wine tourism and

sustainability has been studied multiple times and often go hand in hand (Vázquez Vicente et al., 2021)

In wine tourism specifically, sustainability feeds off of environmentally healthy practices such as organic and biodynamic farming, efficient water and energy use and the preservation of local biodiversity. It also extends to social sustainability, where tourism supports local communities while the tourism benefits are being distributed around the community (Montella, 2017). Wineries and wine regions that integrate these principles usually not only attract environmentally conscious visitors but also strengthen their brand reputation and competitiveness in the global market (Carlsen & Boksberger, 2015).

A study by Dias et al (2023) suggest that sustainable wine tourism is no longer a niche market, rather it is more of an expectation. Especially for younger travellers who like to search for ethical consumption and authentic experiences (Alonso & Liu, 2012; Dias et al., 2023). López-Guzmán et al. (2014) add that wine regions which integrate sustainability practices, such as reducing their carbon footprint, offering eco-certified accommodation, and preserving cultural heritage can enhance their competitiveness in the tourism market and strengthen their long-term resilience (Lopez-Guzmán et al., 2014).

As Slovenia has positioned itself as “Green, Boutique and Diverse” it does match well with the current trends in tourism (Slovenian Tourist Board, 2025). This fact can also be seen in the country’s constant growth in international tourists (Republic of Slovenia, 2024). Here the *chance* aspect of the diamond comes into play since trends are not necessarily something that can be foreseen, while also with the help of *government*, branding the destination is a factor.

## **2.5 Economic impacts of wine tourism**

In 2024 it was estimated that the tourism industry will contribute around 11 trillion dollars of the global GDP, which is the highest it has ever been (Oladipo, 2024). A year

prior, in 2023 the wine tourism's market size was around 46 billion dollars, which was roughly 0,42 % of the global tourism industry. Additionally the global wine tourism market is projected to double by 2030 (Grand View Research, 2023), which presents an opportunity for emerging wine tourism destinations like Slovenia. In order to be a part of this projected growth a clear differentiation strategy needs to be in place.

Study from Vázquez Vicente et al. (2021) show that wine tourism boosts the economy in the wineries' communities and can create more job opportunities for local in order to support the tourism/wine industry (Vázquez Vicente et al, 2021). This can be seen especially in areas where wine tourism is particularly popular. In 2023 Napa Valley hosted around approximately 3,7 million wine tourists that contributed to around 2,5 billion dollars to the local economy (Frank, 2024). According to Dressler (2017) 66% of tourists visiting Franken wine region in Germany were planning to buy wine from the vineyard before the trip. Additionally 17% bought wine spontaneously and one third of the visitors used more than 200€ for their wine purchases, giving clear evidence that wine tourism boosts wineries' economic growth (Dressler, 2017).

Studies from Alonso & Liu (2012) and Bruwer (2003), show that for small and medium-size wineries wine tourism has a significant economic importance. This is backed by Remeňová et al (2019) who state that wineries have globally reported that 19,5% of their income is coming from wine tourism. However about a third of the wineries do not offer tastings or other activities for wine tourists (Remeňová et al, 2019). As wineries are located on more rural areas, wine tourism can be even more beneficial to the area's economic prowess, as employment opportunities are otherwise scarce in these areas (Vázquez Vicente et al, 2021).

As wine tourism is predicted to grow alongside with the tourism industry, the wineries have started to implement different strategies to attract more tourists. Many studies show that wineries have implemented storytelling and marketing strategies such as social media advertisements, elements which are directly linked to Barney's (1991)

resource-based view theory (Lockshin, 2000; Woldarsky, 2019). Connecting different elements involving wine, such as touring and tasting or pairing foods with wines has also become very popular amongst wine tourists (Woldarsky, 2019), once again emphasizing the importance of *complementing* industries.

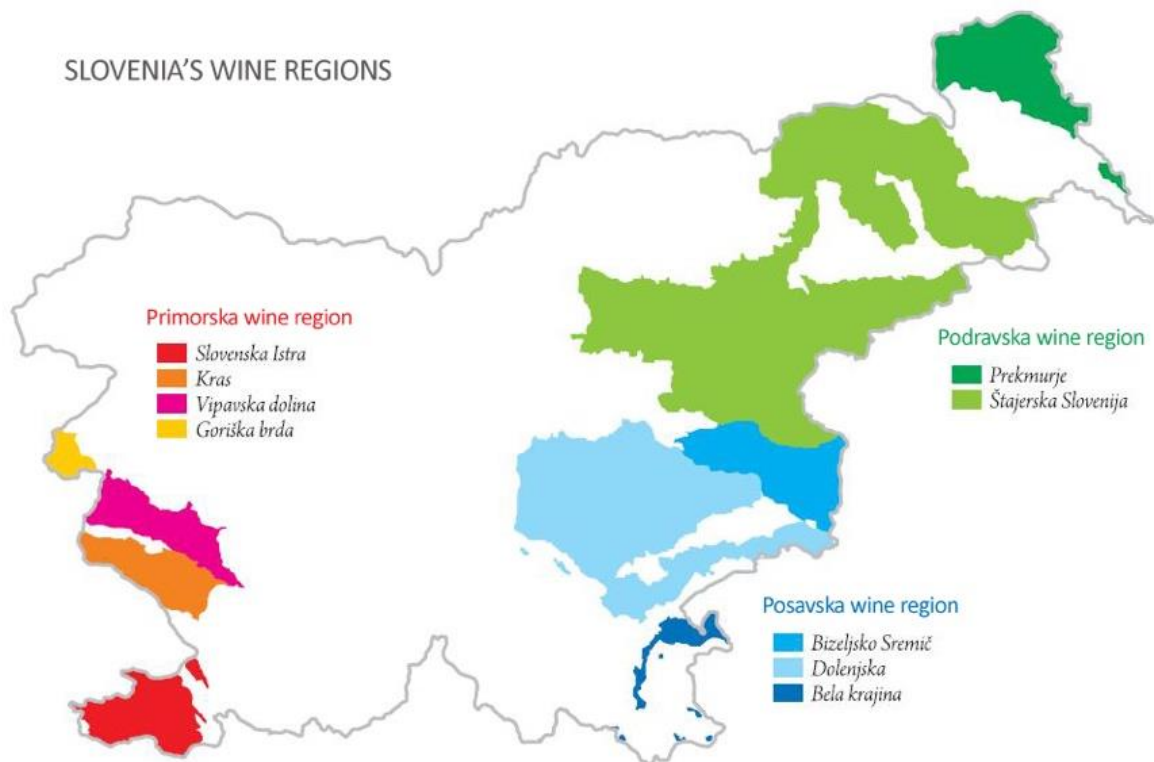
In United States and Italy wineries have increasingly turned to digital branding and storytelling through online platforms and social media to attract consumers (Simeon et al., 2017; Frost et al., 2020). Wineries in Spain have successfully utilized their origins as a branding strategy, linking wine quality to regional heritage, hence strengthening consumer trust and the local brand (Gómez & Molina, 2012). Wineries can also emphasize the brand experience through education on wine, and personal interactions with staff and other visitors (Joy et al., 2021). Additionally giving the tourists experiences strengthens the impact of experiential tourism and acts as a competitive differentiation strategy.

Ultimately, by diversifying their portfolios into tourism, Slovenian wineries can significantly boost revenue while strengthening both their brand and the surrounding community. Tourism not only increases on-site sales but also creates long-term value through customer retention.

## **2.6 Slovenian wine and wine tourism**

Slovenia has three main wine regions and nine wine growing districts around the country (Figure 4). The regions have their own unique characteristics, which differ from one another. Additionally all regions have their own wine routes in certain districts, which are built to make regions more attractive for wine tourism and in order to enhance the local communities' economy (Slovenian Tourist Board, n.d; Bruwer, 2003). The country has more than 2500 registered wine producers, but when taking into account other agricultural producers that also cultivate wine, the number jumps to 28.000 (Republic of Slovenia, 2021). Combined the country produces between 800.000-900.000 hectolitres of wine annually (Slovenian Tourist Board, 2024).

In 2023 around 6,19 million tourists visited Slovenia, grossing over 3.7 billion euros and creating 3,3% of the country's GDP. International tourists made around 75% of the total amount (Republic of Slovenia, 2024; Slovenian Tourist Board, 2024). Exact statistics on winery visitations were unavailable despite several requests from different tourist organizations in Slovenia. In 2024 the numbers grew even more, with approximately 6,58 million visitors in the country, it marked the highest amount ever. Additionally the international tourists made around 77% of the tourists, rounding to around 5,05 million foreign visitors (Republic of Slovenia, 2025).



**Figure 3.** Slovenian wine regions (Source: thinkslovenia, n.d)

**Primorska wine region** is located in the Southwest of Slovenia bordering Italy and Croatia. and consists of four different wine districts; *Goriska Brda*, *Kras*, *Slovenska Istra* and *Vipavska Dolina*. Even though Primorska is not the biggest wine-growing region it produces the most wine in the whole country (Slovenian Tourist Board, 2025). The region

is dominated by the Mediterranean climate, all though the northern and western parts of the region have experience more continental climate because of the distance to sea and higher hills (Kerma, 2012). The Primorska area cultivates several local and international wine grapes, with Goriska Brda and Vipavska Dolina dominating mostly the white wines and Kras and Slovenska Istra representing over half of the red wines (Kerma, 2012).

**Podravska wine region** is located in the Northeast of Slovenia, bordering Hungary, Austria and Croatia. By size it is the biggest wine region in Slovenia and it consists of two different wine districts; *Prekmurje* and *Štajerska Slovenija*. The region is mostly known for its high-quality white wines. Because of the area's cooler climate it's an ideal place for specialty wines which contribute to aromatic and unique wine profiles (Vršič et al., 2024). One of the most known wine routes in the area is the Maribor Wine Route that runs through the wine region covering over 10 vineyards (Slovenian Tourist Board, 2025). In addition the region has the world's oldest vine called *Žametovka* which is over 400 years old, located in the center of Maribor (Visit Maribor, 2025).

**Posavska wine region** is located in the Southeast of Slovenia bordering Croatia. Where the regions of **Primorska** and **Podravska** have bigger vineyards and are more internationally recognized, Posavska has smaller family owned vineyards and traditional wine-making practices. The region is split into three different districts; *Dolenjska*, *Bizeljsko-Sremič* and *Bela Krajina*. As in other regions, the climate plays a big role in the wine profiles. Posavska - having more continental climate – has fresh white and red wines with good acidity (Slovenian Tourist Board, 2025; Vršič et al, 2024). Cviček is a unique wine blend specialty made in the region with low alcohol percentage and slightly tart taste, which is also protected by the EU (European Union, 2025).

Jurinčić & Bojnec (2009) researched wine tourism development in Goriska Brda region in the western Slovenia, which is also the most popular wine district in the country. This revealed a few key factors about the state of Slovenia's wine tourism at the time. Out of

the 20 wineries examined only four were open to visitors before Slovenia declared independency from Yugoslavia in 1991. It is worthy to note that Yugoslavia was a socialist not a communist country and unlike the Soviet Union its citizens were able to travel abroad as well as tourists were free to visit the country (Tchoukarine, 2015). In addition the most of the wineries reported that they had under 500 visitors annually, out of which most came from neighbouring countries Italy and Croatia (Jurinčić & Bojnec 2009).

No later or more accurate data based on international wine tourist visitations on different wine regions was found during the initial research on the topic, all though contact efforts were made to several government institutions. Closest estimate was the previously mentioned 250.000 tourists that took part in wine-related activities in 2023.

**Table 2.** Wine tourism success factors in Porter's diamond

<b>Success factor (in literature)</b>	<b>Diamond element</b>	<b>Implication for Slovenia</b>
Attractive scenery and climate (Getz & Brown, 2006)	Factor conditions	Diverse landscape and microclimates give natural factor advantages
Demanding tourists driving service quality (Estevão at al, 2018)	Demand conditions	International tourists' expectations can improve wineries service and quality
Wine routes and cluster coordination (Bruwer, 2003; Hojman & Hunter-Jones, 2012)	Related and supporting industries	Active collaboration between wineries and complementing industries
Experiential differentiation and storytelling (Pine & Gilmore, 1999; Joy et al, 2021)	Firm strategy, structure and rivalry	Competing with boutiqueness and experience based differentiation

Destination branding and sustainability positioning (Slovenian Tourist Board, 2025)	Government & chance	National branding of green and boutique aligns with global trends
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### **3 Porter's diamond framework**

In this chapter wine tourism in Slovenia will be taken under examination with Porter's diamond framework (Figure 1). The model will be applied to see how Slovenian wineries can utilize their characteristics to their advantage on international wine tourism markets. All the information for this chapter are from secondary sources and they act as a base for the study's preliminary assumptions.

#### **3.1 Porter's diamond in service industries**

As mentioned, originally Porter's diamond was developed to explain national competitive advantage in manufacturing and in industrial sectors (Porter, 1990). However over time the model has been adapted to analyze competitiveness in service and experience-based sectors, which include tourism and hospitality. (Enright & Newton, 2004; Dwyer & Kim, 2003). Even when service sector has little to no physical input and resources are mostly intangible such as human capital and experiential value, the main logic of the Porter's diamond can still be found (Cracoli & Nijkamp, 2008).

Adapting the diamond model to tourism – in this thesis more particularly wine tourism – comes with limitations. In tourism competitiveness relies heavily on the image of the destination, branding and visitor experiences, which are not covered by the original diamond model. In the context of wine tourism, the diamond gives a structure for analyzing the traditional competitiveness elements of the diamond such as workforce skill, resources and government support, together with experiential perspective of tourism. To give an example, in factor conditions, wine tourism does not only take into account the quality of the vineyards but also the authenticity and other services like gastronomy, which may be included with the vineyards (Crouch & Richie, 1999).

While the diamond model requires some adaptation - which was addressed and highlighted in chapter 1 - the basic principles are still being utilized. The systemic approach allows the thesis to link between national competitiveness and wine tourism,

enabling the assessment of Slovenia's wine tourism, through the Porter's diamond model.

### **3.2 Application to Slovenian wine tourism**

PDM is proven to be useful tool for wine tourism as well. Chong (2017) studied the potential of wine tourism in Thailand using the PDM and got some encouraging results for the relatively small and unknown form of tourism. The research showed that Thailand's wine regions gave a large opportunity for wine tourism to grow. All the aspects of the diamond were in line with growing wine tourism, but since the country is known for beaches, clear waters and vibrant nightlife it can be difficult to grow tourists' interest in getting to know local wines (Chong, 2017). Additionally some other studies on wine tourism have been conducted, with parts of the Porter's diamond being implemented in the study.

As mentioned before there has been no previous studies on Slovenian wine tourism using PDM. To analyze Slovenia's potential in the European and global market, the thesis applies PDM (1990) to the Slovenian wine tourism and examines the wine tourism industry with the primary and non-primary factors. The following factors act as assumptions for the study. In chapter four when the factors will be supplemented by the results from the interviews and the analytical assumption will be compared to the results.

For each factor of the diamond, there will be an explanation how it will be applied to the wine tourism industry in Slovenia. Since wine tourism has many re-occurring themes, there may be some overlapping and repetition among the different factors. Moreover the different adaptations in Table 1 are applied to the following chapters.

#### **3.2.1 Factor conditions**

*In Slovenia's factor conditions we take into account the country's landscape, geographical location, vineyards and workforce.*

Located in the Central Europe, the geographical location of Slovenia makes it very accessible for wine tourists from all around Europe. The country has one airport with international flights; Jože Pučnik airport, which is located around 25km from country's capital Ljubljana (Ljubljana Airport, 2025). Near Slovenia's border lie cities like Zagreb, Graz and Trieste which are all within an hour from Slovenia and have all international flight connections, making the country even more accessible for tourists.

While Slovenia has a very diverse terrain and large selection of different wines, it is also relatively small covering only 20.271 square kilometres. Additionally wineries are often quite small and family-owned (Republic of Slovenia, 2025). Slovenia's small size can be seen as an advantage for the country; covering all the wine regions would not require as much travel compared to the neighbouring countries such as Italy or Austria. And as mentioned in chapter two, all wine regions have vastly different microclimates affecting them.

The main language in Slovenia is Slovenian, but 75% of the population speak English and 23% of the population speak more than two foreign languages. Most common spoken foreign languages after English were Croatian, German, Serbian and Italian (Slovenian Times, 2024). For example the Zlati Gric winery in Podravska region offers tastings and winery tours in German (Zlati Gric, 2025).

From RBV perspective (Barney, 1991), Slovenia's factor conditions include a bundle of location-specific advantages which are difficult for competitors to replicate; proximity to bigger cities with international airports, diverse microclimates enabling varied wine-production and multilingual workforce.

### 3.2.2 Demand conditions

*The demand conditions will take a look at the type of tourists Slovenia attracts, what the tourists are looking for and how their demands could shape wine tourism*

As mentioned, tourism numbers have been rising, not only in Slovenia, but also globally. Growing tourism paired with growing interest in sustainable, experiential travel makes for a great combination from Slovenia's perspective because they "fit" the brand. According to Slovenian government there were over 12 million overnight stays from international tourist, equalling a growth of 7% from previous year and surpassing the previous record amount. The total amount of international tourists that visited the country was approximately five million, which was also a record breaking number for Slovenian tourism. Furthermore 55% of the international visitors came from Germany, Italy, Austria and Netherlands (Republic of Slovenia, 2024).

According to UN Tourism (2024), younger generations are prioritizing sustainability, experience and ecotourism when choosing their traveling destinations. The shift can be explained by institutional theory, which describes how external pressures can shape organizational behaviour. The prioritization of sustainability, experience and ecotourism creates isomorphic pressure for Slovenian wineries to meet the demand of tourists. Lavandoski et al (2016) studied wine tourism in Portugal and found in their study that wineries responding to demand-sided institutional pressure were most likely to develop competitive tourism offering.

Forbes article in 2025 gives an insight on how Slovenia's sustainable tourism is on high demand, but also highlights a new problem with overcrowding, which is a common problem in neighbouring country Croatia (Forbes, 2025). As vineyards are mostly located on more rural areas, it could prevent overcrowding in the most popular tourist areas (Ljubljana and lake Bled), by providing a green, more unique option.

### 3.2.3 Related and supporting industries

*For related and supporting industries, the factor will take into account local gastronomy, hospitality sector and wine routes. In terms of wine tourism related and supporting industries could be translated to **complementing industries**.*

One of the strongest supporting industries for Slovenian wine tourism is the hospitality sector with countless boutique hotels, wellness centres, fine-dine restaurants and even golf courses near with the vineyards vicinity. Additionally many wineries themselves offer bed and breakfast service (Koščak, 2018). This clear evidence of a cluster, which creates collective competitive advantage to all stakeholders in the area (Porter, 1990). Additionally wine routes are available for tourists with bikes and there are even “wine safaris” where tourists are driven from one vineyard to another (Slovenian Tourist Board, n.d).

As Slovenian restaurants have gained more popularity internationally, on the side it has directly increased the visibility of wine tourism. Gastronomy has become a key motivator for international tourists to travel to wine growing regions, with tourists seeking authenticity and local food experiences (Slovenian Tourist Board, 2022). There are three restaurants in Primorska region with one or more Michelin stars, making them possible partners for wineries and attracting culinary tourists in the area (Michelin Guide, n.d).

Furthermore, Slovenia was designated as European Region of Gastronomy in 2021 by the International Institute of Gastronomy, Culture, Arts and Tourism (IGCAT). The award is a reflection of commitment and success of integrating sustainability and culture in gastronomy (European Regions of Gastronomy, 2021). Events like Open cellars day in Brda and St. Martin’s day festival week in Maribor are just some examples on how Slovenian wine and gastronomy are combined and have long-lasting traditions in embracing regional identity (Brda, 2025; Visit Maribor, 2025) .

As complementing industries (like Michelin star restaurants) have a high standard of service, it also can also create higher expectations and *demand* of service for wineries in the region, making demand conditions and complementing industries interactive with one another. As Estevao et al (2018) mentioned, high tourist expectations and demand increase service quality.

### **3.2.4 Firm strategy, structure and rivalry**

*For this factor cooperation amongst wineries and local branding will be highlighted*

As the wineries are often quite small and family-owned, they have seen the opportunity to grow through co-operation (Kerma & Gačnik, 2015). The co-operation includes wine routes, sharing marketing costs and linking wine tourism with local gastronomy and other activities. Co-operating with local wineries is not only economically feasible, but it also can provide positive reputation to the country's wineries and make the tourism aspect more interesting to the customers (Kubat & Kerma, 2022). Clear focus of Slovenian wineries is to make the tourism more experiential and personal rather than attract masses. However a lack of strategic coordination is mentioned one of the challenges for wine tourism in Slovenia (Kerma & Gačnik, 2015).

Slovenian Tourist Board are promoting tourism branding, which aligns with wineries' positioning. In chapter 2.6 it was mentioned that wineries have started using storytelling and immersive experiences as a competitive weapon, and this is no different for Slovenia, where wineries emphasize family heritage and sustainable production methods. Family and sustainability aspects also work for Slovenian tourism in the broader picture since, the three main points of "I Feel Slovenia" -campaign are "Boutique, Green and Diverse" (Slovenian Tourist Board, n.d).

*Factor conditions with firm strategy, structure and rivalry, have an evident interaction where the wineries position themselves as small and boutique as a differentiation*

strategy. Utilizing the advantage of being smaller is something that competitors cannot necessarily do.

### **3.2.5 Government**

*For this factor the study will highlight the efforts and policies of Slovenian government to better international wine tourism in the country.*

Slovenia became the first ex-Yugoslavian country to join the EU in 2004. Because of this the country has had an opportunity to be integrated into EU-policy making, financing and free trade much longer than its ex-Yugoslavian counterparts. In 2009 the country became a full member of the Schengen area, making traveling into the country much easier from other EU-nations. In addition Slovenia became a part of Eurozone in 2007 (European Union, 2025).

Additionally with EU, Slovenian wineries have gained an opportunity to have funding to grow their business. With a program like LEADER which has rural development initiatives, wineries have an opportunity to modernize their facilities as well as enhance tourism services and give more complementary (Cunder & Bedrač, 2010).

Slovenia can be viewed as “pro-wine” and the country actively supports its wine producers through different legislations. For example the government has exempted wine from excise duty and VAT is the only tax included in the price. In comparison other alcohol products like beer and whiskey, which are also produced in the country and fall under the excise duty (Financial Administration of Republic of Slovenia, 2017).

Slovenian tourist board is the main institution which is responsible for the development, marketing and promotion of Slovenia for international tourists. For wine tourism their website has extensive catalogue of the different wine regions, wine routes and wine related activities. They provide in-depth information on every region and recommend additional activities when visiting (Slovenian Tourist Board, 2025).

Demand conditions and firm strategy show similar trends as government element of the diamond, so it can be determined that they affect one another. Demand of sustainable travel has driven Slovenia's government to position their brand and the wineries' brands as sustainable and green.

### **3.2.6 Chance**

*In this factor we will look at negative or positive external and uncontrollable events that could affect the wine tourism in Slovenia.*

Major factor affecting Slovenian wine is climate change. With temperatures in wine regions rising in three past decades by 1,7 degrees on average, which can have direct effects on grapes and harvest quality. For some regions like Podravje in northern Slovenia the temperature rise can enhance ripening conditions, but for warmer Primorska area the dryness and hotter climate could pose a risk in the future (Vršič et al, 2024). European Environment Agency (2024) echoes the same risk that the climate change includes more threats, since it will raise the likelihood of extreme weather conditions and droughts.

Covid-19 pandemic was an unpredictable hit on the world economy and one of the most affected industries amongst many others was tourism. This was also the case for Slovenia's international tourism numbers, which plummeted to a record low in 2020 due to the lockdowns (Republic of Slovenia, 2024).

Additionally different accolades that Slovenian food (like Michelin stars or mentions) and travel destinations have received over the years, can serve as catalysts for visibility for Slovenian wine tourism. Global tourism trends are also a major factor in chance. Since eco-tourism, experiential tourism and sustainability have grown over the past decades, these trends should positively affect Slovenian wineries.

*Chance* aspect interacts with every other factor of the diamond except the factor conditions, which are not subject to quick or sudden changes. The rising of sustainable travel and strategically positioning of “green and boutique” supports the differentiation strategy that Slovenian wineries use.

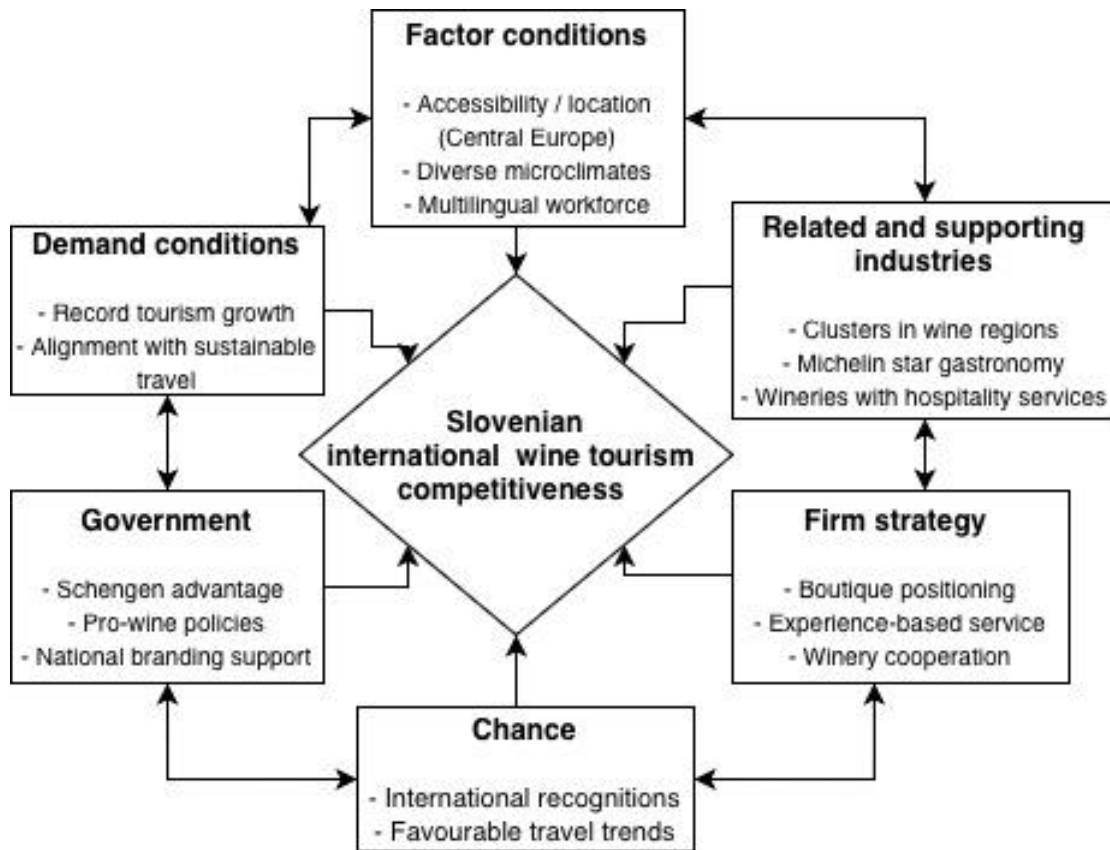
### **3.3 Summary of the Slovenian wine tourism industry**

This preliminary analysis addresses the first research question of the study “*What are the competitive advantages of Slovenian wine tourism that the Porter’s diamond highlights*”.

Based on secondary sources, Slovenia’s competitive advantage in international wine tourism comes from interactions between diamond elements, not from a single factor. The analysis shows a distinct competitive positioning: accessible, sustainable, experience-oriented with budget-friendly prices. Another advantage is the country’s as wineries’ alignment with current tourism trend as they have positioned them as boutique and sustainable.

Additionally clusters in wine regions show potential even if their coordination was highlighted as being poor by Kerma & Gačnik (2015) It has to be taken into account that this gap in coordination represents possible weaknesses in international competitiveness for Slovenia, which the latter part of this study will examine in the interviews.

The preliminary analysis cannot fully answer the second research question “*Which diamond elements are most influential*” without empirical evidence from the wineries. Based on these secondary sources a suggestion for what a Porter’s diamond for Slovenian wine tourism would look like:



**Figure 4:** Proposed Porter's diamond on Slovenian wine tourism

## **4 Research methods**

This chapter goes over the research's chosen method, data and sample collection, and data analysis. In addition reliability and the validity of the research will be gone over in the last chapter.

### **4.1 Research method and design**

The research method of this thesis is based on relevancy of answering the research questions (Eriksson & Kovalainen, 2008). The thesis utilizes a qualitative case study design, with Slovenia's wine tourism industry being in the centre of the analysis. The main advantages of exploratory and illustrative research are its flexibility and adaptability; it can change as new data emerges and new insights are discovered. Initially, exploratory research may begin with a broad focus, but as the study goes forward, it typically becomes more specific (Saunders et al., 2007; Eriksson & Kovalainen, 2008).

As the study's nature is exploratory study is a useful approach to ask open-ended questions that help gain deeper knowledge and insight into a topic and it can help to clarify understanding of an issue, problem or phenomenon (Saunders et al., 2007). Qualitative data is collected through open-ended and semi-structured interviews, which is the main source of primary data in this thesis. Interviews are well-suited for exploratory studies, which this paper also aims to be (Piekkari et al, 2004). Additionally with a smaller sample size interviews are a more suitable way to conduct the study (Piekkari et al, 2004).

The interview questions are designed to address the all the factors of Porter's Diamond Model, while letting the participants to elaborate on their experiences and opinions on the questions. The open-ended format is flexible and ensures that both expected and unexpected themes can emerge (Eriksson & Kovalainen, 2008). The choice of qualitative methods is based on the need to have in-depth perspectives of the Slovenian wineries which are the primary source of wine tourism in the country. The interviews enable

capturing insights that may not be possible through quantitative approaches (Creswell & Poth, 2018).

The wineries were contacted via email and will be given an option to either answer questions via email or with a video interview. These two options were presented because of the geographical distance and video/phone interview and email are both recognized as ways of conducting a qualitative study (Hawkins, 2018). Presumption was that most of the interviewees will likely have English either as their second or even third language and the email written answers option was aimed to lower the threshold to participate. Additionally as most of the interviewees agreeing to do the interview alongside their job and the semi-structured email interview gives them an opportunity to answer the questions in their own pace. This could potentially produce more considered and reflective responses, since the interviewees have more time to think about their answers, which may improve the data (Hawkins, 2018 ; Dahlin, 2021).

All the interviewed wineries chose to do the interviews via email and they were sent the set of questions (appendix 1), with an email where they were encouraged to add anything that they felt was important or not mentioned in the questions. With no face-to-face interviews, it is crucial to recognize that email interview set some limitations to normal interactions that would happen in an interview, such as non-verbal clues and on the spot probing questions, that could lead to more conversation (Dahlin, 2021). Participants were informed about the study's purpose and what their role in the thesis was, ensuring consent. Additionally the participants were kept anonymous and a permission to use their answers was confirmed, following the ethical research practice standards set by the University of Vaasa (University of Vaasa, n.d)

## **4.2 Data collection and sample**

For this study a total of 25 wineries from all three wine regions (Primorska, Podravska, Posavska) were contacted and eight agreed for an interview with the email open-ended questions. Out of the eight wineries three answered the questions, with five never

responding. One winery was given a total of 2 extra/probing question which are marked in the appendix 1. Dahlin (2021) mentions that with email interviews, giving the interviewees a flexible timeframe and freedom to consider their answers can in some cases lead to poor retention and/or loss of participants (Dahlin, 2021). As the contacted wineries were chosen by the interviewee it is important to recognize that there is a possibility for self-selection bias. As the participation for the study was voluntary, the participants who chose to answer questions could differ from the ones who did not, which may affect the repetitiveness (James, 2006).

Depending on the wineries' size and management structure the all the interviewees were either owners of the winery or worked in the management of the winery. All interviews were conducted during the spring of 2026. The three criteria for the wineries and interviewees:

1. Wineries have to offer wine tastings for international visitors. This was ensured by checking if their website had an option for English language and option to book a wine tasting.
2. Wineries have to either sell or export wine outside the country. This was ensured by researching the wineries' as well as different exporters around Europe.
3. Interviewees can be either the owners, wine tourism experts or upper level management personnel of the wineries.

The wine region, winery's wine production litres, staff and amount of wine tastings for international tourists annually is shown on the table (Table 1). Even though over half of the interviewed wineries came from Primorska region, it is not detrimental for the study since it is the most popular and biggest wine region in the country (Kerma 2012).

**Table 3.** Interviewed wineries

<i><b>Wine region</b></i>	<i><b>Size (hectares)</b></i>	<i><b>Annual production</b></i>	<i><b>Staff</b></i>	<i><b>Annual tastings</b></i>
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<i>Primorska</i>	15	50.000 liters	10 + sw	4500
<i>Posavska</i>	1,5	10.000 liters	2	30
<i>Primorska</i>	8	30.000 liters	1 + sw	2800

### 4.3 Data analysis

With the study being conducted as exploratory and data collection method through semi-structured interviews, the data analysis is a challenging part of the thesis. In addition with semi-structured interviews, obtained data can be difficult to compare since some interpretations may vary even when the set of questions are the same (Eriksson & Kovalainen, 2008). In this study's case the number of respondents is extremely small it becomes even more crucial to handle the data carefully in interpretation.

Additionally it should be noted that English may be the interviewees' second or even third language, which could also affect the results and answers. However, since all the interviews were conducted by email, the interviewees had more time to proofread their answers which could decrease the risk of misunderstandings.

To analyze the data, thematic coding is used, categorizing responses according to the six elements of Porter's Diamond while also identifying new themes that extend beyond the theoretical framework. This combination of deductive and inductive coding ensures that the findings are both structured and reflective of stakeholders' lived experiences (Braun & Clarke, 2022). By integrating these interview insights with secondary data analysis, the study builds an overall Porter's Diamond framework for Slovenian wine tourism, highlighting both the theoretical and practical dimensions of competitive advantage.

For this research, thematic analysis will be taking place when analyzing the interviews' content. This method is being chosen because thematic analysis emphasizes themes, issues, and concepts, which fit well with this study's purposes (Braun & Clarke, 2022, p. 4-10). In addition, coding will be used in order to identify patterns or themes, which in

this case is the most logical way of analyzing the data. With coding, repetitive patterns and themes that occur in the gathered data are highlighted.

For example all wineries mentioned that they either send guests to other wineries if they are fully booked or if the group size is too big for their facilities. In this case the code used was *collaboration with other wineries*. Or in another case one winery mentioned they had Mediterranean climate which is favourable wine-growing and other winery said they were 200 metres above sea-level on a hill, which was also favourable for wine growth. The code for these answers was *climate conditions*.

The main goal of using coding is to rearrange similar results under one code. This can include things that did occur, did not occur, or in some cases strong opinions that are considered relevant for the study (Braun & Clarke, 2022). Since there were only three respondents, themes that were mentioned by at least two wineries will be included in the tables and main analysis part, with the exception of something theoretically meaningful emerging from a single winery.

#### **4.4 Reliability and validity**

In order to determine the quality of the study, it is important to take a look at the reliability and validity of the study. According to Saunders (2023) the reliability and validity of the research is highly dependent on the question of the study and the questionnaire. Especially the importance of questionnaire is highlighted since it is the source of the collected data and a quality questionnaire will most likely enable quality data (Saunders, 2023, p. 523-530).

In short, when talking about the reliability of the study, it is referring to the extent that the collected data provides consistency in results. This means if the study was repeated multiple times it would yield similar results every time (Eriksson & Kovalainen, 2008). However, as the study is a qualitative and material is gathered from semi-structured

interviews, the repetition of the results may vary, because the data is collected in the present moment.

On the other hand validity refers to the accuracy of what is being measured and if the results of the measurements are within the set parameters. Additionally a part of validity is the generalizability of the results (Saunders, 2023; Eriksson & Kovalainen, 2008). As mentioned in the previous chapter, it is as important to offer opinions that do not align with the provided results/evidence in order to boost the validity of the study. In this study the results are not to be generalized because of the small sample size and as the study aims to carefully analyze just the collected data from the obtained interviews.

Eriksson & Kovalainen (2008) mention that in the field of qualitative research, there are two different schools of thought; whether accuracy of interviews and the observations can be valued with the current criteria of reliability and validity (Eriksson & Kovalainen, 2008). In order to address these concerns and to ensure the transparency in the research, data collection and analysis phases were carefully documented. To enhance credibility the study uses clear coding procedures and provides quotes from the data collected.

Lastly, in order to limit personal bias on the results, the researcher did not include personally visited wineries in the interviews. However given prior experience living in Slovenia, the research questions and interpretation of the answers must be handled with caution and objectively.

## 5 Findings

In this chapter the key findings and themes that emerged from the semi-structured interviews are presented. All the findings will be assessed in each separate factor of the Porter's diamond and will be reflected to IB theories. Main emerged themes from the answers will be presented in each chapter on different tables, as well as quotes to highlight the findings.

### 5.1 Factor conditions

This section presents the main factor conditions that were identified through the interviews.

**Table 4.** Main themes in factor conditions

#### Factor conditions

Good location (wine growing)	3
Accessibility	2
Landscape and scenery	2
Proximity to attractions	2
Climate conditions	2
Hospitality and skilled workforce	2

The most common factor affecting the Slovenian wine tourism, according to the interviewees was the geographical location, in terms of wine-growing, accessibility, climate and landscape (regardless of the winery's location). For most of the wineries Ljubljana was less than two hours away, which gave an advantage with little travel time and an international airport. Wineries also mentioned that being near the border was an advantage with cities like Venice and Zagreb being nearby.

*“Location – easy to access by car or close to the Venice Airport and Ljubljana airport, Mediterranean mild climate makes the season April-October, good amount of the wineries with reputation and tasting facilities, good starting point for the daily trips to other areas of Slovenia, northern Italy, green and agricultural landscape.”*

Another factor that was mentioned by many interviewees was the family-involvement in the business, where the emphasis is in the skilled work-force. Every winery was family-owned to some capacity and they mentioned that it acts as a backbone for their quality of service and a passion for their business.

From an RBV point of view (Barney, 1991) the three factors of geographical accessibility, diverse microclimates and family-based hospitality & expertise, make a bundle of resources that are unique and hard to imitate in other countries. These findings confirm the preliminary assumption from chapter 3, where accessibility and microclimates were mentioned as key strengths. Factor conditions were perceived as a clear competitive advantage for Slovenian wine tourism.

## 5.2 Demand conditions

In this section, the main demand factors that shape Slovenia’s competitiveness in wine tourism are presented. Every interviewee confirmed that they had either steady or increased growth in wine tourism.

**Table 5.** Main themes in demand conditions

### **Demand conditions**

Experience of the tasting 3

Growing interest in wine tourism 2

Reputation and online visibility 2

### Difference between domestic/international visitor 3

#### High quality service 2

All wineries highlighted that there is a clear distinction between domestic and international tourists; domestic tourists were described to be driven by relaxation and local connection, whereas international tourists were described to be driven by discovery, experience and purchase intentions. One winery reported that 95% of their visitors were international and even the smallest quoted that over half of their visitors were international, highlighting the strong international presence in Slovenian wine tourism. This was summed up by an interviewee:

*“They come for the boutique feel of our cellar and our modern branding, but they stay for the personal connection and, ultimately, the quality of what’s in the glass.”*

Wineries stated that as the visitors are mainly international tourists, the importance of creating an experience is vital. The visitors look for authenticity with an immersive experience and great hospitality. Two wineries also stated that online visibility was extremely important to them. For example Google Maps and Tripadvisor were mentioned as being influential in visitors’ expectations and reinforcing of the quality and branding of the wineries.

*“Hard to define (what international wine tourists are looking for). Their expectations are usually connected with reviews on Google Maps and TripAdvisor. Generally, they just want to have a great time and discover new tastes.”*

Overall, the interviews suggest that Slovenia’s wine tourism demand is strongly driven by international visitors. Demand conditions can be categorized as a conditional advantage; heavy reliance on digital platforms creates a vulnerability, but a strong international presence enhances quality. As wineries have positioned themselves for

international markets, the strategic choice aims to grow revenue, but could at the same time limit domestic wine tourism development.

### 5.3 Related and supporting industries

All wineries consistently underlined that cooperation in Slovenia's wine tourism ecosystem was fragmented and there is no throughline. Collaborations between related and supporting industries are reliant on personal relationships rather than institutional structures.

**Table 6.** Main themes in related and supporting industries

#### **Related and supporting industries**

Inconsistent cooperation among stakeholders 3

Small involvement from tourist organisations 2

No usage / low value in wine routes 3

Lack of regional branding 3

Promotion with online wine sites 2

Travel agencies and official tourism actors accounted for a small portion of incoming visitors, which highlighted that external stakeholders' involvement is limited. All wineries called for a strategic curation on national and regional level. The lack of coordination is consistent with Kerma & Gačnik (2015) from chapter 3. Two wineries highlighted that wine tourism itself is not "tourist category" in many tourist organisations' eyes even though Slovenia is a traditional wine growing country with long traditions.

*"There's definitely room for improvement. The biggest issue is that different organizations often work in "silos" rather than as a connected network. We need a more unified ecosystem where everyone is moving in the same direction."*

The fragmentation that was identified by interviewees represents a significant weakness. Porter's (1998) cluster theory argues that cluster competitiveness is dependent on both the physical location of the cluster and strategic cooperation and action between the stakeholders. With little to no cooperation Slovenia has unrealized potential.

One of the interviewees gave a thorough example on how "equal promotion" by state-owned organisations is not working. As there is no differentiation in regional wine tourism marketing, wineries who emphasize wine tourism and wine tasting, and have it as their core business, are marketed the same way as wineries whose core business is wine distribution.

*"There is a major weakness – equality. All state-owned organizations have to equally represent ALL the suppliers, regardless if some of the suppliers are actually doing something GOOD and others just say that "they can also do wine tastings" . It is not the same... You cannot promote a local restaurant and a 3 stars Michelin restaurant in the same way... it does not work."*

The probing question on this matter, the interviewee further elaborated on the issue with a deeper explanation on what they thought the problem was.

*"...it is not that EQUALITY is a problem... the fact that state owned organizations are obliged to equally disperse the focus and promotion on all players, regardless of the quality, brand, reputation, existing added value to complete branch."*

Lavandoski et al (2016), identify that a coercive pressures (government regulations) have an affect shaping winery behaviour. However in Slovenia's case this is negative coercive pressure, which is created by the equality mandate. This compromises quality-based differentiation and pushes wineries away from collective marketing, suggesting that the institutional affect disrupts competition rather than supports it.

All wineries noted that wine routes have very limited usage because they are not found effective. Two wineries described as outdated and associated with mass-drinking tourism, which is not what the interviewees' brands align with. This suggests that rather than supporting Slovenia's positioning of boutique wine tourism, the wine routes undermine the competitive positioning.

When reflecting on material gathered from secondary sources, it was quite surprising result that only one winery mentioned cooperation with a local restaurant in terms of wine tourism. Additionally only one winery worked with local tourism platform and another one with an online wine forum.

Related and supporting industries represents a significant competitive weakness for Slovenia's international wine tourism. While physical clusters exist they are not utilized to their full potential due to lack of institutional coordination or even its counter productivity.

#### **5.4 Firm strategy, structure and rivalry**

The wineries described a consistent theme of unique experiences as their differentiation strategy, which aligns with IB research on SME competitiveness (Galli-Debicella, 2021). Each winery highlighted the importance of personalized wine tasting experience with direct interaction with the producers, which were in all cases the owners of the wineries. This strategy was viewed as crucial in building long-term relationships and authenticity with the visitors.

**Table 7.** Main themes in strategy, structure and rivalry

##### **Firm strategy, structure and rivalry**

Unique and authentic experience 3

Collaboration with other wineries 3

Healthy but limited competition 2

## Quality and premium positioning 2

## Digital/online marketing 2

Premium branding and quality in service emerged as important differentiation strategies for two wineries. The same two highlighted their focus on being premium or boutique, with the support of international recognition. It was pointed out by one of the interviewees that not all wineries try to compete with premium tasting experience, making differentiation in the market more effective. One winery's take on differentiation strategy:

*"Premium and super premium wines, nice looking tasting room, highly professional wine tastings..."*

In terms of markets and rivalry, every winery said having collaboration amongst other wineries in their area as an important part of the area's competitiveness, which suggests more cooperation rather than competition, at least for the interviewed wineries. All of them said they have and will continue to redirect visitors to neighbouring wineries, whether they would be fully booked or the group size would exceed their capacity. Overall cooperation was viewed positively and as something beneficial to the area.

*"We actually collaborate with our "competitors"—if we're fully booked, we'll always send guests to another local producer. Healthy competition is good; it keeps us sharp and forces us to keep improving our service."*

Firm strategy, structure and rivalry represent a competitive strength. It is important to note that there were several overlaps with finding that were also mentioned in the demand conditions, which implies that strategic decisions being made based on the demand and visitor expectation.

## 5.5 Government

All wineries thought that government's role in wine tourism and its development was either very limited or inconsistent. The absence of clear policies and lack of "visible" promotion in rural tourism on national level, were mentioned by two wineries. However one winery did mention the possibility of getting funding from government or EU in infrastructure development.

**Table 8.** Main themes in government element

### Government

Need for national marketing strategy	3
EU and national funding programs	1
Lack of effective promotion or policies	3

Questions also got some mixed results with one winery even questioning that if government helped in marketing, would everyone be interested in being part of it. This goes back to chapter 5.3 where "equal promotion" by regional and state-organisations was seen as more harmful rather than something that would be beneficial.

All the participants called for a stronger marketing strategy on a national level, which would position Slovenia as a distinct wine tourism destination. They also highlighted that current marketing is mainly handled by local wineries and stakeholders, which makes it static and fragmented, which was also highlighted in the results of chapter 5.3.

Wineries called for a coordinated effort by the Slovenian Tourist Board to raise more awareness on Slovenian wine tourism internationally, which would align all the regions under one marketing umbrella. One winery summarized this by saying:

*“We need more sophisticated, high-level marketing on a national level and better incentives for tourism providers—like hotels and wineries—to actually work together on joint packages.”*

From an institutional theory perspective there is a paradox: formal institutional frameworks such as Slovenian Tourist Board exist, but they fail to provide institutional support. These findings contradict the preliminary assumptions from chapter 3 in which the government was seen as a potential strength due to EU-membership, funding and national branding campaigns. While institutional conditions on a macro-level (EU and Schengen) still provide advantages, on regional and national level support for wineries is weak, which leads to the result of government being a conditional weakness.

## 5.6 Chance

Wineries identified many external factors (mostly positive) that have and continue to shape wine tourism in Slovenia. Most common themes were boutique branding and growth of nature and rural tourism.

**Table 9.** Main themes in chance element

### Chance

Growing boutique destination appeal 2

Steady tourism growth 3

Geopolitical instability on travel 2

Mass tourism vs. boutique identity 2

Climate change 1

Overall every interviewee believed that there were more positive external factors in the future rather than risks. Wineries were able to specify that tourists who come with cars from neighbouring countries or further away are the biggest spenders and as long as the borders stay open there is a big room for growth. Coincidentally one winery was able to

identify that their biggest customers (in terms of spending) come from Netherlands and Belgium, out of which the Dutch were also pointed in the government statistic site as being one of the biggest tourist groups (Republic of Slovenia, 2024).

All wineries mentioned that they have noticed Slovenia's popularity grow, which they believed has also led to the growth in Slovenia's wine tourism. Additionally one winery mentioned the country's branding of "green and boutique" being a huge plus in their opinion. Some other positive external factors that they mentioned were the growth of fine-dine food sector and general growth of knowledge of the country's wine regions.

*"Slovenia's reputation as a "green, boutique" destination is a huge plus. People are tired of crowded tourist traps; they want peace, green landscapes, and something authentic."*

The biggest risk factors were the current wars in Ukraine and Iran, where they create uncertainties in traveling. Mass-tourism was another risk that was mentioned by all the wineries, but on the other hand one winery raised a concern about Slovenia becoming "super premium" travel destination. Climate change was small concern for many wineries, even though few mentioned that warmer climate is already affecting their wine-growing techniques.

*"For Slovenia, I do not see many risks. The only risk is having a left-side government pushing taxes high and hence making Slovenia a "super premium" country to visit"*

*"...opportunity is that Slovenia is finally being "discovered" as a hidden gem, but the risk is that we might eventually lose that boutique feel if mass tourism takes over. Climate change is the other big worry—it's already affecting how we grow our grapes..."*

The back and forth answers on with mass tourism and identity preservation is a strategic paradox. The attributes that give competitive advantages such as authenticity, boutique-ness and uniqueness can be wiped away by “too much” success. Wineries have clearly recognized uncontrolled growth as a threat.

All wineries except for one – which was formed after covid-19 - stated that the pandemic was not a “big deal” for their winery. Some interviewees were even surprised about the question regarding covid since it was a long time ago, but because it is a practical example of a *chance* aspect it was included in the questions.

## 5.7 Summary of key findings

Through all the elements of the Porter’s diamond the interviews give a coherent picture of Slovenia’s competitiveness in international wine tourism. Factor conditions were a clear strength for Slovenian wine tourism competitiveness. In *demand conditions* this was reinforced as the growth of international wine tourists, who increasingly value authentic and immersive experiences was recognised by all wineries. Additionally the importance of reputation in online visibility was highlighted.

However *related and supporting industries* show significant fragmentation, where cooperation is mainly based on individual relationships, rather than coordinated strategy and effort. State-level promotion lacks quality-based curation which limits the development of regional branding. What came up in *firm strategy, structure and rivalry* was that despite this wineries have developed their own strategies, focusing on premium and/or boutique positioning, storytelling and digital visibility. Competition amongst wineries is on healthy basis, which is reaffirming high-standard service.

The influence of *government* was seen as limited, with all interviewees calling for more structured marketing and clearer support. In *chance* aspect, Slovenia’s rising reputation as green and boutique destination, with the steady growth of wine tourism was seen as

a big positive external factor. Geopolitical instability affecting tourism as well as potential mass-tourism were seen as relevant risks by all wineries.

For the last extra question one winery wanted to add that in their opinion the wine tourism in the country is in a good place, because the wineries themselves started developing the experience.

*“Wine tourism in Slovenia and especially in the (wine area), evolved because of the “players” in this branch that understood that wine tourism has little to do with WINE and more to do with HOSPITALITY.”*

Additionally while Porter’s diamond highlighted the fact that wineries shape their strategies to demand of international visitors, this highlights that the diamond cannot clearly differentiate demand and supply in this field.

**Table 10.** Findings reflected and assessed

<b>Diamond element</b>	<b>Preliminary assumption</b>	<b>Findings</b>	<b>Assessment</b>
Factor conditions	Strong element	Confirmed	Strength
Demand conditions	Strong element	Confirmed	Conditional strength
Related industries...	Mixed	Weaker than suspected	Weakness
Firm strategy...	Moderately strong element	Stronger than suspected	Strength
Government	Strong element	Weaker than suspected	Conditional weakness
Chance	Mixed	Stronger than expected	Conditional strength

## **6 Conclusion and discussion**

This chapter goes over some of the key findings and connects them to the preliminary assumptions based on secondary sources and theoretical framework, which were presented in the thesis. Additionally the a new diamond is introduced, based on the empirical findings. For conclusion of the thesis this chapter will provide answers to the set research questions of the thesis. Lastly the limitations and future research suggestions are briefly discussed.

### **6.1 Restatement of research problem and approach**

This study examined the competitive advantages of Slovenian wine tourism in the international market. As Slovenia has positioned itself as “green, boutique and diverse”, wine tourism remains an under-researched sector despite having long wine-growing traditions. Existing studies have mainly focused on individual regions (mainly Primorska) with no clear international perspective and limited attention to the wine tourism industry as a whole.

To address the research gap this thesis applied Porter’s diamond model as a primary analytical framework for evaluating and analyzing the competitiveness of Slovenian wine tourism. The model was adapted to fit wine tourism service-based and experience-oriented industry, as it was originally designed for industrial and manufacturing industries. The study combined different IB theories, wine tourism literature and competitiveness research in order to make a structured understanding of the elements affecting/influencing Slovenian wine tourism.

The study had a qualitative approach, where a preliminary analytical assessment of each element of PDM was developed based on secondary data and existing literature. These assumptions were examined and refined through semi-structured email-interviews with Slovenian wineries.

## 6.2 Summary of key finding by diamond factors

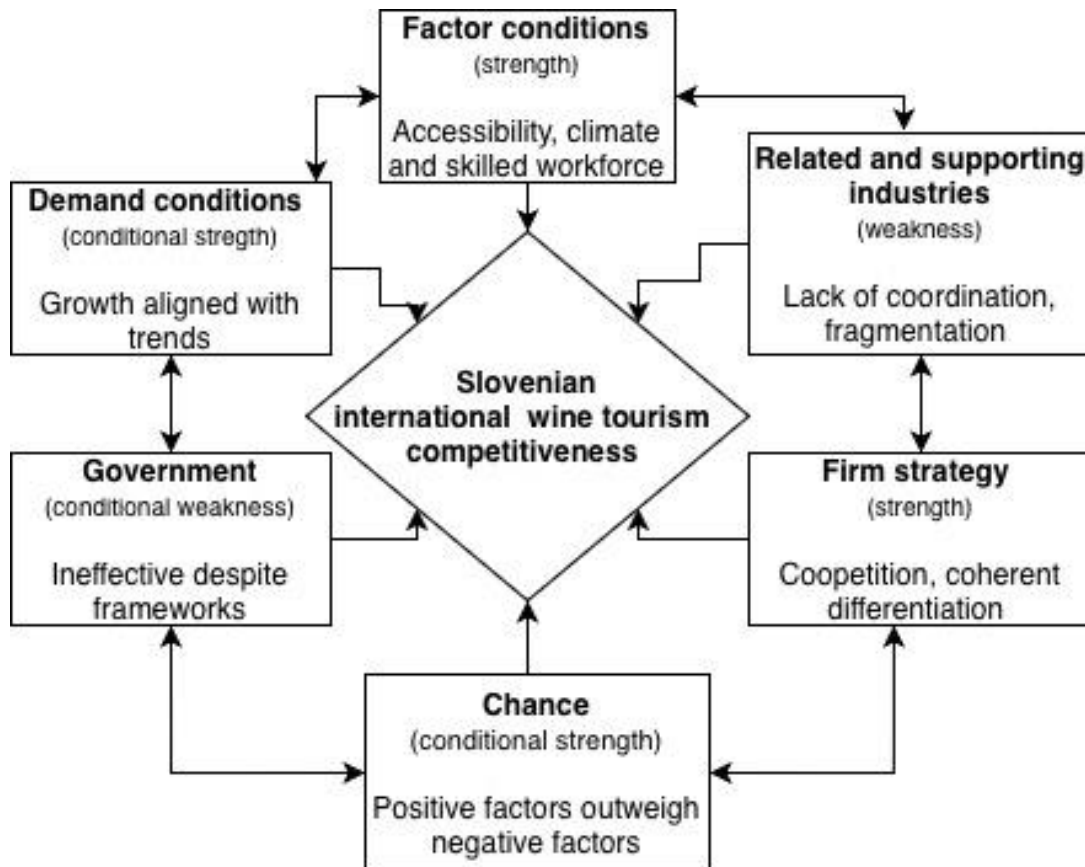
In this chapter the thesis answers the two research questions and goes over the refined Porter's diamond model on Slovenian wine tourism.

In chapter 3.3 Slovenia's competitive advantages based on secondary sources were the following "sustainable, experience-oriented with budget-friendly prices". After empirical findings all these advantages are still valid, all though these advantages were refined and expanded.

Slovenia's competitive advantages lie in the country geographical position, landscape and climate. The country is located in Central Europe, and even though it is comparatively small, it has a range of different microclimates and its size gives an advantage, where travel times are quite short even from neighbouring countries. These resemble VRIN-type resources, though not fully applicable (Barney, 1991).

Another competitive advantage is the wineries' strategies that they have developed in order to differentiate themselves in the international wine tourism market. Being boutique, authentic and experience-oriented, is aligning with SME differentiation strategies (Galli-Debicella, 2021). This strategy has worked well due to current sustainable travel trends as well as the rise in tourists who want authentic experiences.

Some other competitive advantages which were highlighted by the diamond model were tourism trends that aligned with Slovenia's branding, skilled workforce and family-based business and overall positive views on the future with consistent growth during the past decade (excluding pandemic years).



**Figure 5.** New refined diamond model

The most influential elements of Porter's diamond in terms of Slovenia's international wine tourism competitiveness, based on secondary sources and three interviews, were factor conditions and firm strategy, structure and rivalry. Factors conditions were a presumed strength from preliminary assumptions, but firm strategy, structure and rivalry's strength was found from the empirical studies. As mentioned before factor conditions are hard to replicate by competition (in this case other countries) which makes a sustainable advantage.

Factor conditions and firm strategy were followed by demand conditions and chance factors, which were highlighted to be interactive with one another. The diamond also highlighted one clear weakness which was related and supporting industries. The lack of coordination alongside with equal marketing and in some cases even counterproductivity by tourism organizations and public institutions were a clear cause

for concern. Through the interviews, it was apparent that there are some tensions between these institutions and wineries, which have emerged either from equal promotion which undermines wineries that are focused on wine tourism or just a lack of cohesive marketing. Additionally government was highlighted by Porter's diamond to be a conditional weakness partly due to these mentioned factors.

### **6.3 Theoretical implications**

This study illustrates how Porter's diamond model can be adapted to a niche, service-based tourism industry, hence contributing to international business literature. While framework was not originally designed for service-based industries, this study's findings suggest that the model can also explain competitiveness in experience-oriented industries such as wine tourism. However contextual adaptation is needed for some elements of the model when applied to tourism setting.

The study highlights the relevance for differentiation strategies for SMEs that operate in competitive international markets. As Slovenia cannot compete with production volume or international recognition with its neighbours Italy and Austria, it has to utilize differentiation strategies similar to what SMEs have to do in their own respective fields. For Slovenian wineries this means boutique positioning, authenticity and personalized experiences. This is supported by IB literature arguing that small economies gain competitiveness through niche positioning and differentiation (Galli-Debicella, 2021).

Secondly the study shows how intangible and location-based resources create sustainable competitive advantage in wine tourism, which is contributing to the RBV-literature. Findings suggest that Slovenia's landscape, climate, accessibility and family heritage are hard for competition to recreate and thus valuable. These resources align with Barney's (1991) VRIN framework.

Thirdly the study contributes to institutional theory by showing the importance of coordination (or in this case lack of coordination) between public institutions and

wineries. With fragmented coordination and inconsistent promotion Slovenia's wine tourism competitiveness is reduced/held back, even when the building blocks for successful coordination are in place. This supports institutional theory arguments that institutional (both formal and informal) structures influence firm competitiveness (DiMaggio & Powell, 1983; Scott, 2008).

Finally the study highlights that demand conditions and firm strategy are highly connected in wine tourism, as wineries actively shape their services based on demand that tourists have. In traditional manufacturing industries these two factors are more clearly separated, highlighting a limitation in the Porter's diamond model in tourism setting.

#### **6.4 Managerial implications**

The study provides several practical implications for Slovenian wineries as well as tourism organizations and policymakers. The findings suggest that Slovenia has a strong competitive hold in wine tourism, but better coordination and strategic development are needed.

For wineries the importance of continuing to focus on authenticity, hospitality and personalized experiences is evident. As interviewees emphasized that wine tourism is more than just the wine, the experience factor becomes increasingly important. Therefore investing in storytelling, personalized experiences and direct interactions with the guests should be continued in the future.

Being digitally visible and managing online reputation were highlighted as important factors in influencing international wine tourists. Therefore investing in social media visibility and multilingual communication could be beneficial for the wineries. As Slovenia is a smaller destination, strong digital presence could be an additional tool to improve international competitiveness and awareness.

Collaboration between stakeholder was fragmented, regional wine routes were not utilized nor was there much region marketing, which are all factors that affect Slovenia's competitiveness negatively. For policy-makers this study highlight the need for more quality and strategic promotion. This would include changing the highly criticized promotion that does not distinguish between wine tourism- and wine production-wineries. More strategically curated marketing could lift Slovenia's competitiveness in international wine tourism and strengthen its positioning.

Lastly, tourism growth was something that interviewees were both optimistic and reserved about. Therefore policymakers should manage Slovenia's tourism growth carefully, in order to maintain the country's boutique-ness and authenticity.

## **6.5 Limitations and future research**

The study was planned to do interviews with wineries from each wine region, but as many wineries did not return with answers *Podravska* wine region was left unexplored by this study's empirical part, which is a big limitation since it is the biggest wine region by land size. Additionally very narrow representation of the wineries, having only three interviews, was a big limitation alongside with not being able to conduct the interviews real-time, as the empirical data was collected through email interviews. With qualitative interviews and extremely small sample size, the findings of this study are not be generalized.

Previous studies on Slovenian wine tourism had focused mainly on individual wine regions in the country and as 2/3 wineries in this study were from the same region, their perspectives do not describe the country as a whole. Having said that the results did find many common factors regardless the region.

The study chose only to take into account the perspective of the country's wineries, but for possible future studies of Slovenian wine tourism, other stakeholders' such as restaurants, government officials and tourism professionals in related sectors could be

interviewed. Since there was a lot of criticism from wineries to state-owned entities, it would be important to have their point of view and their take on the issues that wineries raised. As lack of coordination was mentioned by Kerma & Gačnik (2015) over ten years ago and same criticism continues, it could be interesting to see ten years from now, if the coordination between the stakeholders could improve.

Additionally wine tourists who have visited Slovenian wineries around the country could be a subject for study. If there are any differences or similarities in wineries depending on the region, or even having a perspective from different countries' wine tourism could be a subject for study.

Additionally, this thesis focused on the international perspective of Slovenian wine tourism, but it came apparent in the interviews that locals do also wine tours and tastings, which could be subject to future studies.

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## Appendices

### Appendix 1. Interview Questions

#### Background information:

1. What is the winery size (in hectares), your annual wine production (in liters) and number of employees?
2. Do you organize wine tastings or other experiences?
  - a. Approximately how many international visitors participate in wine tastings or wine-related activities annually?

#### Factor conditions:

3. From your perspective, what natural or regional factors make your area suitable for international wine tourism (landscape, infrastructure, traditions, climate etc.)?
4. What resources or capabilities are most crucial for developing wine tourism in Slovenia? For example; skilled workforce, high-quality hospitality services, advertising

#### Demand conditions:

5. How would you describe the demand of wine tourism in your winery?
  - a. How has it changed over past 5-10 years?
  - b. Is there differences between domestic and international visitors? If yes what are they?
6. What expectations do international wine tourists have when visiting your winery?
  - a. Is it more wine or the experience that they are looking for?

#### Related and supporting industries:

7. What external stakeholders do you collaborate with (if any)?
  - a. Tourist organisations, travel agencies?
  - b. Local restaurants and accommodation services?
8. From your perspective how well do these stakeholders cooperate in Slovenia?
  - a. What are the any strengths or weaknesses?
  - b. Do you utilize wine routes?

#### Firm strategy, structure and rivalry:

9. How does your winery try to differentiate itself when attracting international wine tourist? (Marketing, positioning, unique experiences etc.)

10. How would describe competition in your wine region?
  - a. Is there a lot of competition for international wine tourists?
  - b. Do you collaborate with other wineries?
  - c. Do you see competition as something improving the quality of your service?

**Government:**

11. How do government policies or government institutions influence wine tourism in Slovenia?
  - a. Is there promotion?
  - b. Are there any regulations affecting your wine tourism services?
12. What type of support would help develop international wine tourism in Slovenia?

**Chance:**

13. What external factors or trends have affected/influenced wine tourism in Slovenia?
  - a. Are there any tourism trends that you have noticed?
  - b. How did covid-19 effect your winery's operations in terms of tourism?
14. What possible opportunities or risks do you see for the wine tourism development in the future (climate change, increasing tourism, tourism trends)?

Something else to add regarding international wine tourism in Slovenia?

**Probing questions:** 8 a) You said that equality is a big problem in state-owned organisations. Are you referring to Slovenian Tourist Board and/or some other state-owned organisation? And how do you think this could be fixed/improved in practice