

Tourism Development Concept

of the Bratislava Region
until 2030



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Content

| | |
|--|----|
| Introduction | 5 |
| Regional statistics | 6 |
| Microregions and sustainable tourism | 9 |
| Terms and definitions | 10 |
| Concept structure | 11 |
| Principles | 11 |
| Sustainable tourism | 13 |
| Destination management | 15 |
| Destination marketing | 17 |
| Synergy of regional development policies | 19 |



Introduction

Thanks to its cultural and natural heritage, the Bratislava Region is a unique and attractive destination with potential for further development. However, it faces challenges such as the low number of overnight stays, the uneven visitation among 4 micro-regions, or the lack of funding resources for tourism.

Concept of tourism development in the Bratislava Region until 2030 presents a fundamental strategic document for the tourism sector, which defines the main problems, challenges, and priorities of the territory. The document is based on the analysis of the territory and other conceptual documents of the Bratislava Region, primarily the Economic and Social Development Programme of the Bratislava Region for the years 2021-2027 (PHRSR BSK). In 2019, the Bratislava Region was the strongest Slovak region for short-term and foreign tourism. This position creates a strong motivation for Bratislava Region to develop tourism, but on the other hand, it raises the already mentioned challenges, which need to be addressed through effective destination management and appropriate measures.

Tourism is one of the most dynamic and fastest-growing segments in the global economy. The growing trend, which puts pressure on infrastructure, the environment, local communities, and other wider areas, calls for the creation and implementation of tools, which are necessary to ensure the sustainability and quality of our environment. This need was reinforced by the COVID-19 pandemic due to which tourism found itself at the level of 30 years ago.

A post-pandemic restart of tourism leaves room for the incorporation of models of social inclusion as well as the restoration and protection of the environment, which play a key role in the long-term goals within individual policy segments. This post-pandemic tourism restart gives regions a unique opportunity to redefine their sustainability, digitalization and innovation setting, and overall development. However, the priority for the Bratislava Region is the completion of basic infrastructure as well as the introduction of functional processes for the further development of tourism in the region.

Regional statistics - data from 2019



1,5 mil.

number
of visitors



2/3

foreign versus
domestic visitors



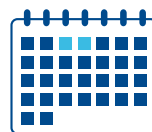
top region

in overall visitors and
foreign visitors in Slovakia



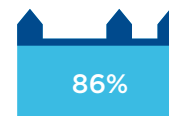
foreign visitors

mainly from Czech Republic,
Germany and the UK



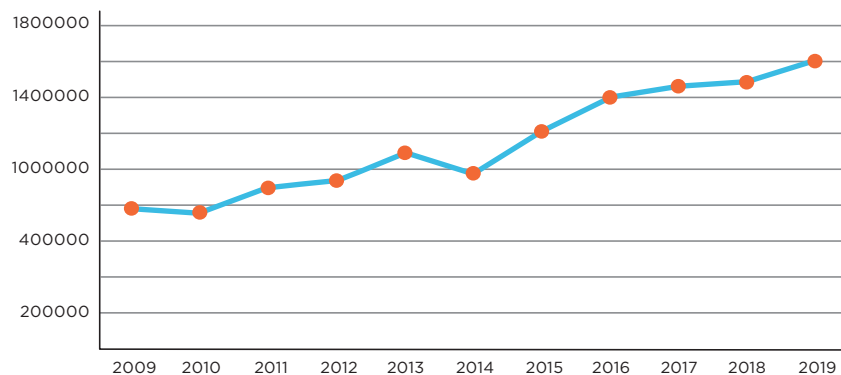
length of stay

2.07 days;
(the Slovak average - 2.8 days)



Bratislava

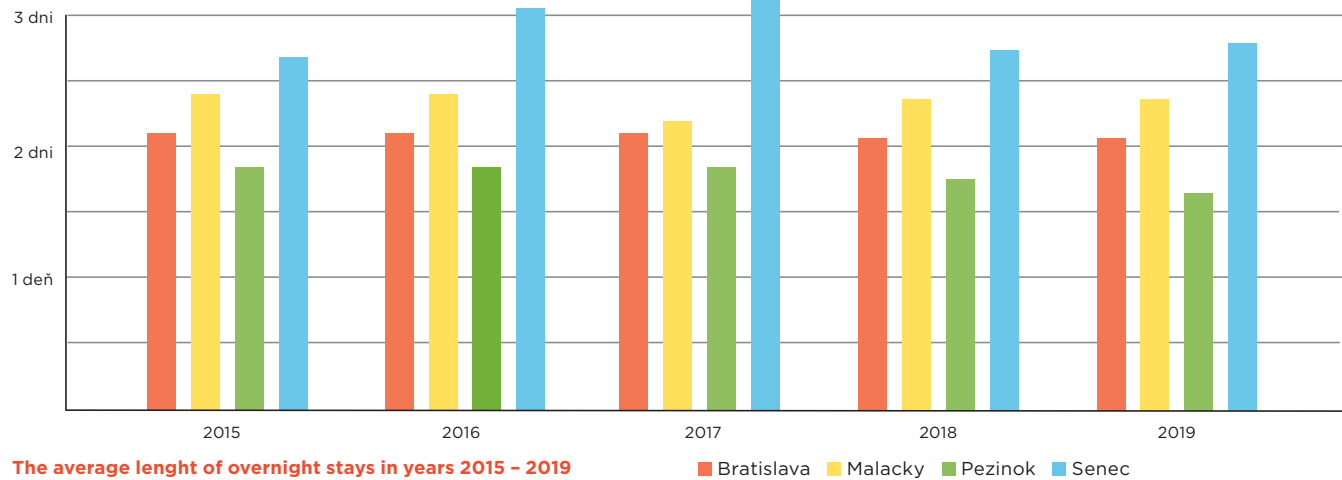
86% visitors in the region
visit the city of Bratislava



Development of the number of visitors in
the Bratislava region in years 2009-2019

Microregional data from 2019

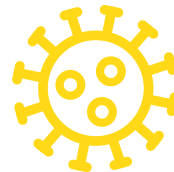
Senec - the highest average length of stay
(2.8 nights)
Pezinok - the lowest average length of stay
(1.7 nights)
Bratislava - 86% of visitors from overall
number of visitors



The impact of the COVID-19 pandemic on tourism

Regional data from 2020 - during Covid-19 pandemic

- the highest decrease of visitors among Slovak regions up by 68.5% ↑
- the third most visited region in Slovakia
- a decrease of foreign tourists by 76% ↓
- a decrease of domestic tourists by 54% ↓
- a decrease of employment in accommodation and food services by 12.3% ↓
- a decrease of sales in accommodation establishments by 72% ↓
- an increase in the average length of stay by 10% (to 2.28 days) ↑



Microregional data from 2020 - during Covid-19 pandemic

- Bratislava - the most significant decrease in visitation (71%) ↓
- Malacky - the least significant decrease (54%) ↑
- Malacky, Pezinok, Senec - increase in the share of visitors in the overall number of visitors ↑
- Bratislava - the largest decrease in the number of overnight stays (68%) ↓
- Senec - the smallest decrease in the number of overnight stays (43%) ↓





Microregions and sustainable tourism

MALOKARPATSKO

Activities focused on the development of:

- wine tourism in the Little Carpathians wine region
- horticulture
- gastronomic tourism (eg. goose feast, traditional foods - lokše, scískanice)
- traditional local production (eg. majolica, ceramics, pottery)
- the territory of the Protected landscape area Little Carpathians
- hiking and cyclo-tourism in the Little Carpathians
- area of the Geopark Little Carpathians and the preservation of traditional Huncokár settlements
- monumental historical city centers with a unique representation of bourgeois and sacral buildings at the base of the Little Carpathians
- networks of mansions, castles, manors, forts, and other archeological sites
- Cultural Route of St. Cyril and Methodius, The vineyard route of the Little Carpathians, The Route of Noble Families

PODUNAJSKO

Activities focused on the development of:

- water areas, rivers Little Danube and Danube and ponds
- networks of historic parks and manor houses associated with the prominent Hungarian family of Esterházi
- networks of sacred monuments
- local activities focused on beekeeping, fishing, cultivation of orchards and vegetables
- the territory of the Protected landscape area Danube Meadows
- cyclo-tourism on Eurovelo 6
- The Route of Noble Families and Danube Islands Destination

ZÁHORIE

Activities focused on the development of:

- the area around the Morava river – cyclo-tourism on Eurovelo13 and water tourism
- recreation at the natural swimming pool Rudava in Malé Leváre
- territory of the Protected landscape area Záhorie
- area of the Geopark Little Carpathians
- agrotourism (ranches, riding schools) and local products (Haban ceramics)
- preserved defence system from the 20th century
- a network of parks and manors associated with the prominent Hungarian family Pálffy
- The Route of Noble Families, The Iron Curtain Trail, The Trail of Jewish Culture

BRATISLAVA

Activities focused on the development of:

- sights and monument zone of the capital city Bratislava
- the historical city center of the capital
- networks of manors, forts, castles, and other archeological sites
- national cultural institutions (Slovak National Theater, Slovak National Gallery, Slovak Philharmonic, Slovak National Museum)
- urban forests
- active tourism on the Danube - Karloveské rameno (the Danube's arm), Danube dyke, a water sports complex in Čunovo
- ponds and gravel pits for recreation
- MICE tourism
- The Route of Noble Families, The Trail of Jewish Culture and Limes Romanus

Terms and definitions

Tourism is a set of activities aimed at meeting the needs related to travel and residence of the person outside of his or her place of permanent residence, usually in his/her leisure time. The goal is to gain a comprehensive experience, which can be relaxation, learning, health, diversion and entertainment, cultural or sports activities, etc.

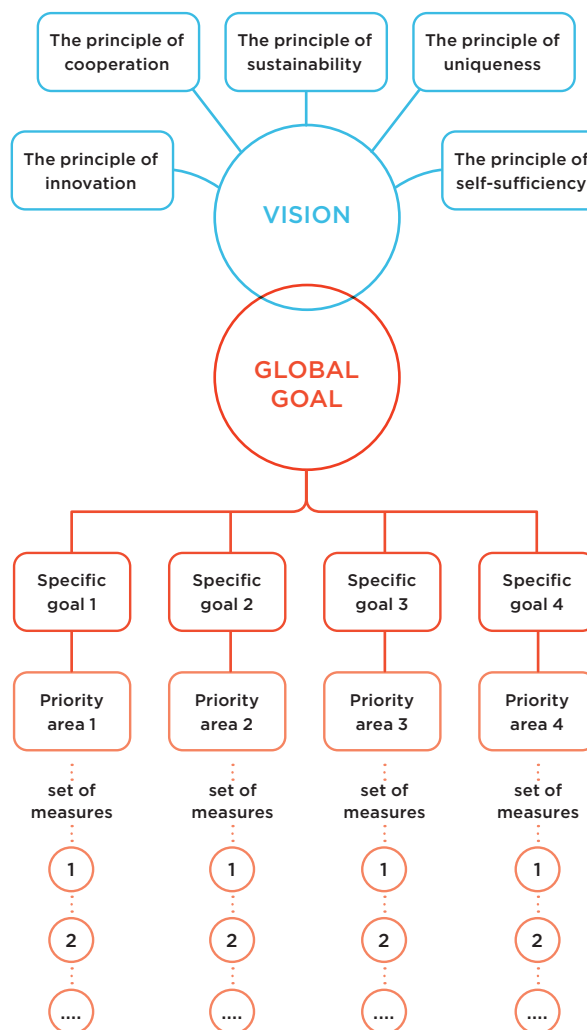
Tourism, as one of many sectors, contributes to environmental pressures through energy consumption, greenhouse gas emissions, or water and land use. On the other hand, due to its multidimensional nature, tourism can contribute to positive change, raising awareness about environmental issues and values. That is why, in our concept, we speak of sustainable development and sustainable tourism.

The main forms of tourism defined in the concept are:

- **Cognitive tourism** includes cultural-historical tourism, ecotourism and geotourism, culinary tourism – gastronomic and wine tourism
- **Recreational tourism** includes nature and rural tourism, agrotourism, and urban tourism
- **Active tourism** includes cyclo-tourism, water tourism, hiking, and sports tourism
- **MICE tourism** includes all events - local, congresses, incentives, etc.
- **Other** – medical and film tourism

The main stakeholders in tourism in the Bratislava region:

- Regional Tourism Organization - Bratislava Region Tourism (KOCR BRT)
- Territorial Tourism Organizations (OOCR) - OOCR Záhorie, OOCR Malé Karpaty, OOCR Senec, Bratislava Tourist Board (BTB)
- Local Action Groups (LAG) - LAG Podhoran, LAG Malokarpatský region, LAG Dolné Záhorie
- Municipalities, cities, city districts
- Service providers



Concept structure

Vision: Bratislava as a region, in which stakeholders cooperate and support each other in the development of sustainable tourism; utilizing the natural, cultural and historical wealth of the region with effective marketing targeted to local specifics and uniqueness of individual micro-regions.

Global goal: To increase cultural diversity and quality, and to support the sustainability of tourism (from Economic and Social Development Programme of the Bratislava Region for years 2021-2027)

Principles

Along with the post-pandemic transformation of tourism, the goal is that all tourism products in the Bratislava region are to be based on the following principles :

The principle of sustainability

- **Environmental sustainability** in tourism points to the need for continuous reduction of the environmental burden and carbon footprint in the creation and development of tourism infrastructure and products.
- **Social sustainability** contributes to the development of a society that is inclusive, fair, diverse, interconnected and democratic. Regional policies must reflect the principle of social sustainability through an inclusive approach to all groups of the population and respect the socio-cultural authenticity of local communities.
- **Economic sustainability** in tourism guarantees well-thought-out and long-term activities that are beneficial for diverse stakeholders, including local communities.

The principle of cooperation is defined as the cooperation of local and regional actors in the creation and development of tourism, as well as in setting the direction of tourism. Participatory policies are better able to take into account the needs and specific conditions of the territory.

The principle of uniqueness points to the utilization of the unique value (or USP) of given territory as a marketing strategy. The development of the region in this case is based on the local specifics of the area, what enables an effective and sustainable development of tourism products.

The principle of innovation is linked to effective cooperation between stakeholders in tourism, who together create a functional and innovative ecosystem capable of meeting the challenges and opportunities of the territory. This ecosystem is strengthened by technological, SMART solutions and tools that support the experience, authenticity and, last but not least, the sustainability of tourism products.

The principle of self-sufficiency defines the region's need to focus on domestic tourism as the main source of tourism due to the health and safety crisis caused by the COVID-19 pandemic, which limited the influx of foreign tourists and negatively affected the tourism industry. The principle does not preclude the importance of the foreign market, but rather draws attention to the importance of domestic market for the sustainability and resilience of tourism.



Priority area 1. Sustainable tourism

SPECIFIC GOAL: To improve the conditions for the development and enhancement of a sustainable tourism offer through development of basic and complementary infrastructure with an emphasis on considerate treatment of natural and cultural heritage.

BASIC CHARACTERISTICS

- Geopark Little Carpathians is **included in the Slovak National Network of Geoparks**
- The Lesser Carpathian Wine Region as **the oldest wine region in Central Europe**
- Up to 59% of people outside the city of Bratislava live in **rural areas**
- There is approximately 1 135 km of marked **cycling routes** and 1 102 km **hiking routes** in the region (data from 2020)
- Congress tourism accounts for **40% of hotel revenues** in Bratislava region

MEASURES



Development of cognitive tourism



Development of recreational tourism



Development of active tourism



Development of MICE tourism

ACTION PLAN*

- Restoration of the historic building of the Slovak National Theater (SND)
- Revitalization of the park and restoration of the manor house in Malinovo
- Establishment of an eco-centre in Modra, as the gateway to the Little Carpathians Geopark
- Creation of a shuttle bus product with a focus on gastronomic and wine tourism
- Construction of the Dürnkrot-Gajary cycle bridge
- Implementation of the Záhoračik Train project
- Support for local producers to increase their participation and attractiveness at relevant events



* a complete list of upcoming projects can be found in the Action Plan of the Tourism Development Concept of the Bratislava Region until 2030



Priority area 2. Destination management

SPECIFIC GOAL: To improve coordination between organizations involved in the development of tourism in the Bratislava region in order to increase the efficiency of activities and guarantee the continuous development of the Bratislava Region as an attractive destination.

BASIC CHARACTERISTICS

- The national destination management and marketing company **Slovakia Travel** was established in 2021
- The services sector accounts for **60% of regional GDP**, with services accounting for **70% of the total employment rate**
- **Thematic routes** located in the territory of Bratislava region: Cultural route of St. Cyril and Methodius, The Iron Curtain Trail, The Route of Noble Families, The Trail of Jewish Culture, The Vineyard Trail of the Little Carpathians

MEASURES



Strengthening the system of destination management



Effective and coordinated cooperation of organizations involved in destination management



Development of thematic routes and tourist destinations as a tool for tourism development

ACTION PLAN*

- Thematically focused regional subsidy scheme (BRDS) responding to the needs of tourism in the region
- Allocation of funds from the budget of Bratislava region for the construction of a unique infrastructure
- Creation of conceptual materials for the development of thematic and cultural routes



* a complete list of upcoming projects can be found in the Action Plan of the Tourism Development Concept of the Bratislava Region until 2030



Priority area 3. Destination Marketing

SPECIFIC GOAL: To facilitate targeted marketing support for tourism products that are essential for the regional development.

BASIC CHARACTERISTICS

- Bratislava region as the **strongest region** for foreign and short-term tourism with a continuous increase in visits, overnight stays, and sales in 2019 (pre-pandemic)
- Tourist Information Centres (TICs) are located in each bigger city - in total **12 TICs in the region**
- Regional TIC Gate to Bratislava in Vienna, the 5th largest destination in the world
- **Bratislava Region Tourism** (KOCR BRT) as an umbrella organization for destination marketing on the regional level in coordination with territorial tourism organizations (OOCR)

MEASURES



Support and development of an innovative offer of tourism products



Support for quality of the services in tourism



Marketing support



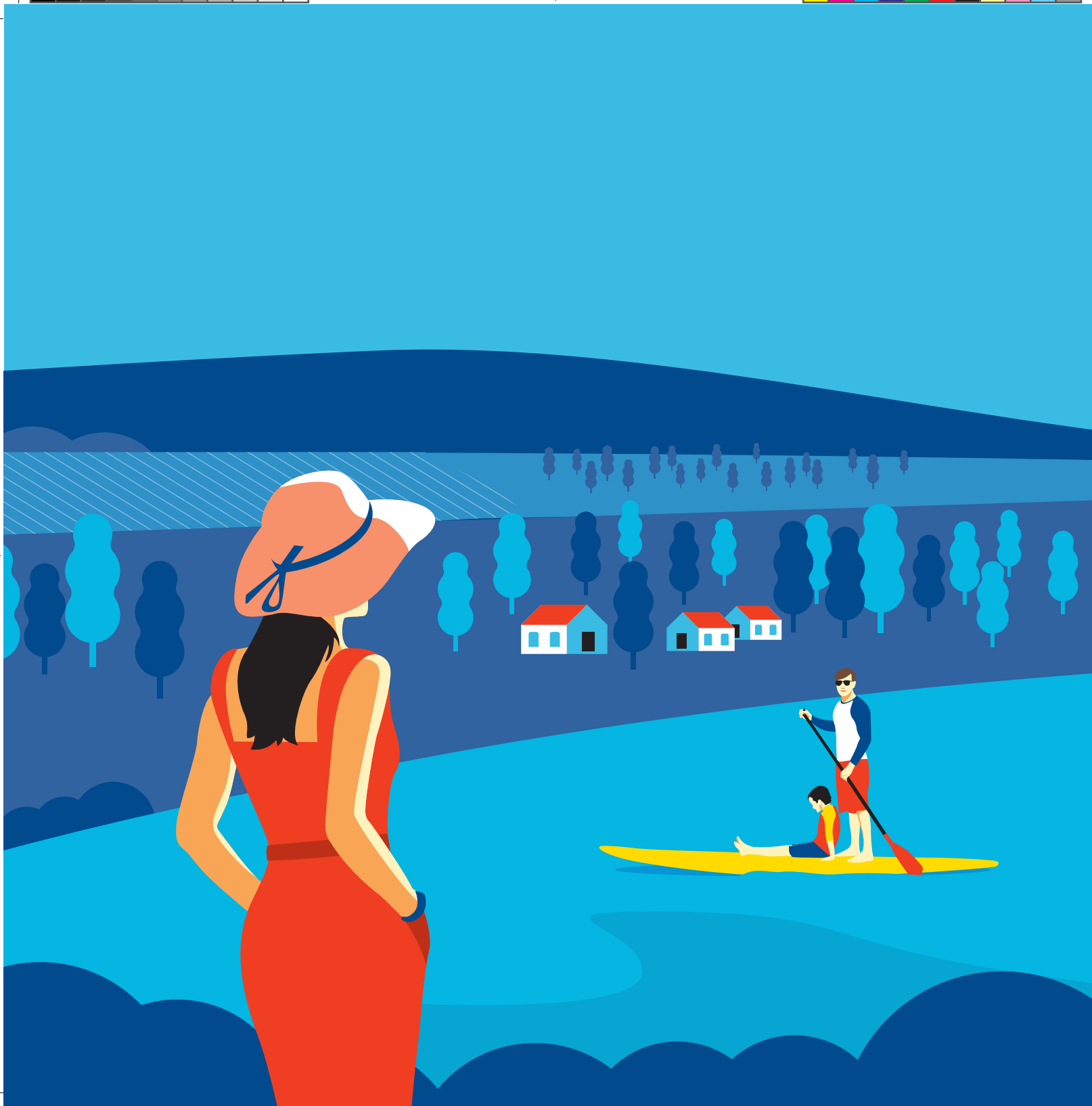
Promotion of the region as a tourist destination on domestic and foreign markets

ACTION PLAN*

- Establishment of a new TIC in the Čunovo ecocentre
- Creation of communication and marketing plan of the destination and its implementation
- Creation of the Catalogue of Small Tourist Infrastructure in the Bratislava region in order to unify its visual identity
- Creation and distribution of the Magazine Bratislava Region



* a complete list of upcoming projects can be found in the Action Plan of the Tourism Development Concept of the Bratislava Region until 2030



Priority area 4. Synergy of regional development policies

SPECIFIC GOAL: To create a synergy of regional development and tourism, which complement each other and thus create suitable conditions for further development.

BASIC CHARACTERISTICS

- We register a total of **17 secondary schools** in the Bratislava region with a department focused directly or indirectly on tourism, of which 9 also offer the possibility of **vocational education and training**
- There is a **weak synergy** between the education system and market needs in tourism
- Bratislava region is accessible by road, railway, aerial as well as water transport - **key transport hub**
- 23% of the area of the Bratislava region is formed by **Protected Landscape Areas** (PLA Malé Karpaty, PLA Záhorie, PLA Dunajské Luhy)

MEASURES



Improving the quality of education in tourism



Streamlining mobility for tourism



Aligning environmental protection with tourism development


ACTION PLAN*




- Building centres of excellence and lifelong learning in tourism related segments: winemaking and sommelier, gastronomy and hospitality, guide and animator services
- Promotion of events with emphasis on the availability of public transport lines
- Preparation of a manual for the installation of additional infrastructure in areas with an increased degree of protection





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