



# The Slovenian Tourism and possibilities for co-operation in the Alps-Adriatic region in the field of Tourism

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# Content

- Global Tourism
- Tourism in Slovenia
- Local characteristics - advantages
- Co-operation in the Alps-Adriatic region



# GLOBAL TOURISM

## **Tourism is a big business worldwide:**

- **important contribution to GDP**
- **major job creator**
- **creator of export revenues in services export**  
(Tourism is a key services export for many economies around the world).
- **contributes to regional economic development.**

Tourism is very diverse sector, including many other industries (= large and very diversified supply chain!).

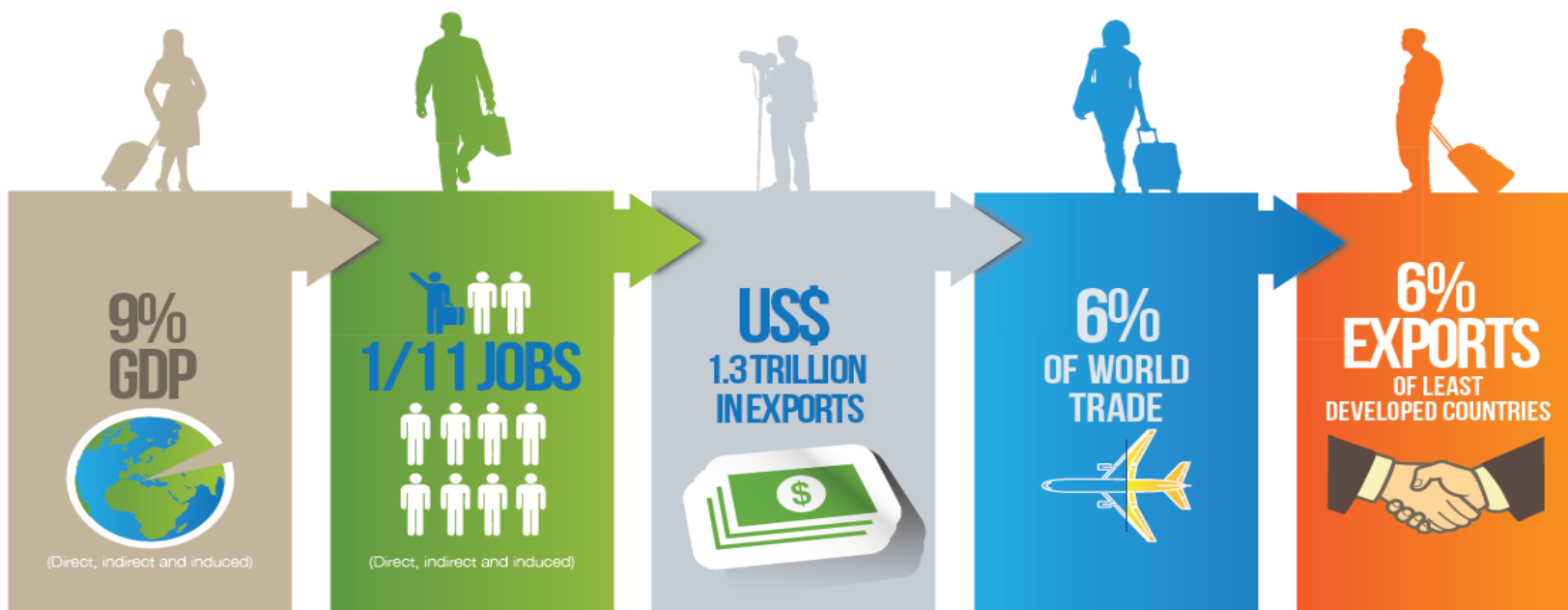
G20 countries also recognise it as a vehicle for job creation, economic growth and development.

**Tourism will create income in areas, where there is no other economic activity possible!**



# TURNING ONE BILLION TOURISTS INTO ONE BILLION OPPORTUNITIES

In 2012, a record one billion tourists crossed international borders in a single year. Another five to six billion are estimated to travel in their own countries every year.



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## WHY TOURISM MATTERS

**Until the end of 2030 the 1,8 bil tourists will travel abroad**  
 (source: UNWTO)



## RESULTS IN 2013

- **International Tourist Arrivals:** 1087 million (+5%) (*Source: UNWTO*)
- **International Tourism Receipts** (BDP Travel): EUR 873 bn (+5%)
- Total European foreign visitor arrivals have grown by 4,8%
- **The fastest growing source markets:** China, Russia (*source: ETC*)
- **80% of tourists travel inside their region** (tourists from Europe in Europe, Asian people in Asia, etc.)
- Domestic tourism is very significant to many countries.
- **Top 10 destinations in 2013:**
  - **Inter. Tourist arrivals:** France, USA, Spain, China, Italy, Turkey, Germany, UK, Russia, Thailand
  - **Inter. Tourism Receipts:** USA, Spain, France, China, Macao.., Italy, Thailand, Germany, UK, Hong Kong.....(*Source: UNWTO*)
- **Top 10 Source markets:** China, USA, Germany, Russian Fed., UK, France, Canada, Australia, Italy, Brazil.



# SLOVENIAN TOURISM





## Tradition of Slovenian tourism

- Over 600 years of using thermal water (Dobrna),
- Over 400 years of tourism in Lipica (famous horses)
- Almost 200 years of tourism in Postojna cave (1819),
- Over 150 years of tourism in Bled (famous lake)
- Over 120 years of organised tourism in Portorož
- Over 110 years of tourism in ski centres and hiking in Julian Alps
- Over 100 years of organized tourism (TAS)
- Over 90 years of Casino in Portorož
- In 80s tourism was recognised as an important branch of the Slovenian economy,
- in 90s: modern SPA tourism (wellness programmes) and casinos became the most important tourist products

# Slovene tourism in 2013

(Source: Statistical Office of RS)



www.slovenia.info

2013	Arrivals		Overnight stays	
	Number	Change 13/12	Number	Change 13/12
<b>Total</b>	<b>3.384.491</b>	<b>+2,6</b>	<b>9.579.033</b>	<b>+0,7</b>
<b>Domestic</b>	<b>1.125.921</b>	<b>-1,4</b>	<b>3.616.782</b>	<b>-3,1</b>
<b>Foreign</b>	<b>2.258.570</b>	<b>+4,8</b>	<b>5.962.251</b>	<b>+3,2</b>

## Top 5 source markets

2013	Overnights (%)	
	Share	Growth
<b>Italy</b>	<b>15,6</b>	<b>-2,9</b>
<b>Austria</b>	<b>11,7</b>	<b>+0,6</b>
<b>Germany</b>	<b>11,6</b>	<b>-0,3</b>
<b>Russian Federation</b>	<b>5,8</b>	<b>-0,6</b>
<b>Netherland</b>	<b>5,3</b>	<b>+6,5</b>
<b>Total</b>	<b>50,2</b>	

### Highest growth rates in overnight stays, 2013:

- Lithuania + 94,5 %
- Brazil: +47,9 %
- Oceania: +48,8 %
- Malta: +44 %
- Korea : +33,2%
- Israel: +27,5%
- Cyprus: + 26,8%

Foreign tourists  
expenditure 2013  
**: 2,04 bil.**  
**+ 1,5 %**

## Tourism today

- 3,4 million arrivals
- 9,5 million overnight stays
- 2,0 billion € foreign tourist expenditure
- 12,8 % BDP (WTTC)
- 40 % export of services
- 4 % employed directly and 12% indirectly



# Overnight stays - European countries, 2013

POSITIVE GROWTH

GROWTH DECLINE

GROWTH +10% and more

GROWTH +20% and more





# Tourism in Slovenia in 2014

**The year 2013 was the record year of the Slovenian Tourism.**

## **JANUAR – JUNE 2014**

- 1.4 mio arrivals (+4,3%),
- 3,8 mio overnights (+ 0,8%)
- + 7,3% growth in international arrivals
- + 3,1% growth of international overnights

## **International Tourism Receipts**

- 879.625.000 EUR (+ 3%)

## **JANUAR – JULY 2014** (Provisional data, SORS):

Tourist arrivals (Index 2014/2013): 102,8

Overnight stays (Index 2014/2013): 99,3

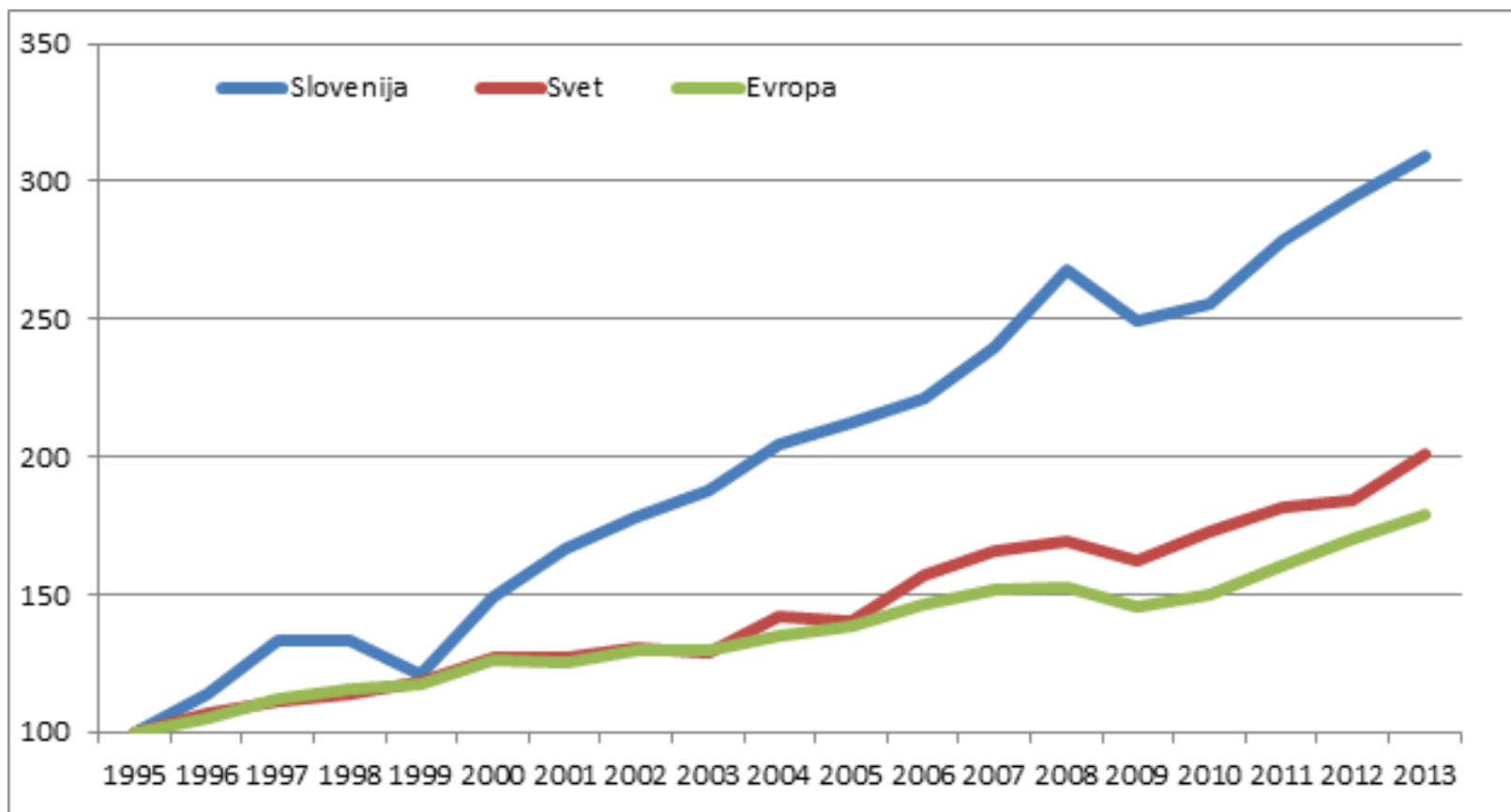
## **International Tourism Receipts**

- 1,063 bil EUR (- 3,2%) in comparison to 1-7 in 2013





## Tourism / International 1995 - 2013





# The Slovenian Tourism Development Strategy 2012 - 2016

## Strategic objective:

### To increase the volume of tourist activity

- **No. of overnight stays: 2%** (annual growth rate)
- **No. of tourists arrivals: 4%** (annual growth rate)
- **Receipts from the export of travel: 6%-8%** (annual growth rate),

In order to achieve the general objectives, it is required that:

- the principles of the sustainable development of tourism are successfully enforced,
- a favorable business environment is ensured,
- higher quality is achieved and conditions are established that will lead to greater competitiveness of Slovenian tourism,
- efficient and innovative marketing and promotion of Slovenia as an attractive tourist destination is planned and implemented.

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# The Slovenian Tourism Development Strategy 2012 - 2016

## Mission

- Slovenian sustainable tourism creates an important part of economic and socio-cultural well-being, revenues and jobs and is an important contributor to Slovenia's international reputation, it is based on intensive marketing of tourist products of internationally recognised brands and high added value.

## Vision & Partnership commitment

- In 2016, tourism in Slovenia will be entirely based on sustainable development and will be, as a very successful industry of the national economy, a major contributor to our country's social welfare and reputation in the world.



# The story of Slovene Tourism

## Green

Slovenia is **one of the greenest countries** in the world and is committed to sustainable development.

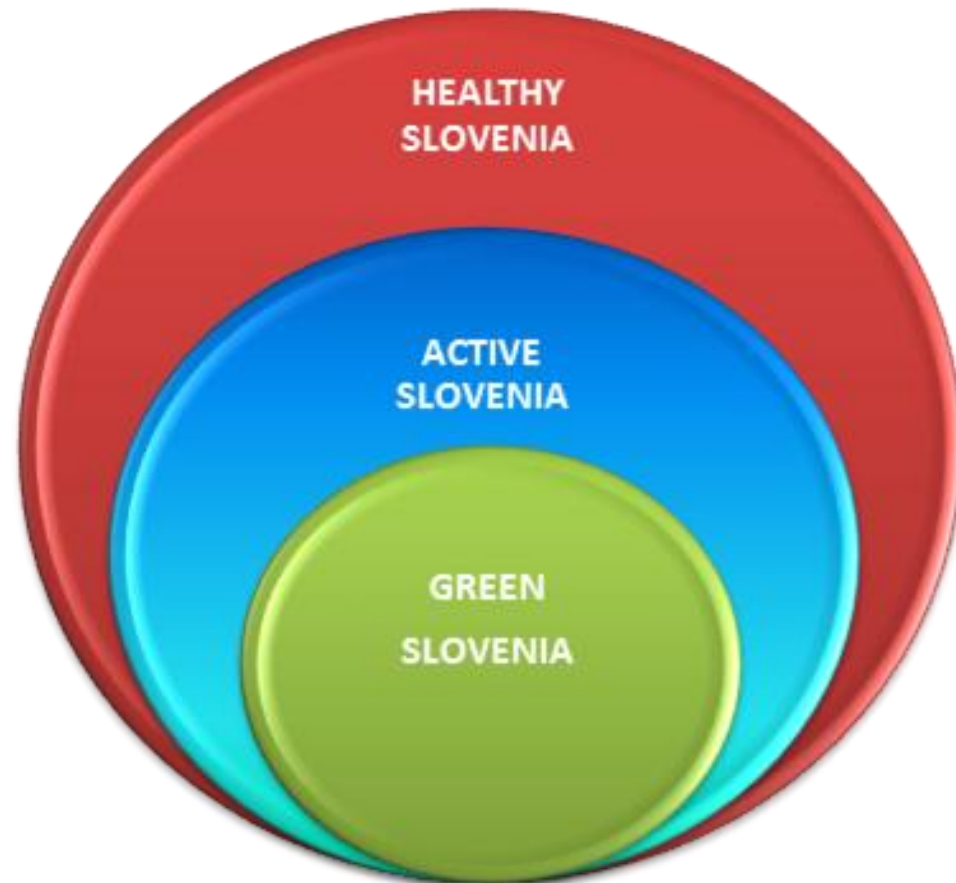
## Active

The diversity of landscape and green resources represents **remarkable possibilities for an active holiday in close contact with nature.**

## Healthy

Nature lovers have a clear goal – **to stay healthy and feel well.**

**Green and active is a healthy Slovenia**



# Basic tourist products

Health and well-being (health resorts, wellness, medical tourism)

Active holidays and a break (winter and summer activities)

Countryside tourism, nature parks, ecotourism, ...

Business tourism

Gastronomy

Culture (festivals, towns, ...)

Entertainment tourism

Cruises





# Local Characteristics – competitive advantages and opportunities



## NATURAL HERITAGE

### POSTOJNA CAVE



### Škocjanski zatok nature reserve - the Bird watching and research Society





# NATURAL HERITAGE

**Natural park Logarska dolina:**



**Pohorje:**



**Protected area Park Sečovlje Salina**



**Adriatic Sea:**





## CULTURAL HERITAGE

**We have very rich cultural heritage with very high tourism potential:**

- Museums and galleries,
- Castles and other monumental buildings,
- pilgrimage tourism,
- Thematic cultural routes,
- Historic cities of Slovenia,
- Houses of Tradition,
- Festivals and performances,
- The Slovenian Philharmonic
- Theatra and Opera
- European capital of culture 2012 (Maribor and partner towns)



**The Strategy of development and marketing of cultural tourism  
2009-2013 was prepared and realized.**



# GASTRONOMY

- In 2006 the **Strategy of development of the Slovenian gastronomy** was adopted. There are presented 24 gastronomic regions of Slovenia and 140 representative dishes.
- Promotional brochure „**Taste of Slovenia**“:



- The project „**Gostilna Slovenija**“ co-ordinated by Chamber of craft of Slovenia“ (Restaurants and inns with traditional Slovenian food are able to join). Over 40 restaurants and inns in the chain)

GOSTILNA SLOVENIJA





REPUBLIC OF SLOVENIA  
MINISTRY OF ECONOMIC  
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# POSSIBILITIES FOR CO-OPERATION IN THE REGION



## PARTNERSHIP: ALPS-ADRIATIC ALLIANCE

Members have:

- **Many similarities**
- **Complementary products**
- **Various opportunities for co-operation**

Slovenia successfully cooperates with the countries from the region of Alps-Adriatic (neighbouring countries).

Some successful cross-border and transnational projects in the field of tourism:

1. Alpe-Adria Trail (Carinthia, Slovenia and Friuli Venezia Giulia)
2. Parenzana (SLO/HU/CRO)
3. Peca/Flow-Country Trail (Carinthia, Slovenia)
4. T-lab (SLO/ITA)
5. Mura-Drava Bike (SLO/CRO), (SLO/AT)



# CO-OPERATION IN THE REGION AND PROPOSALS TO EXPAND

- Alpe-Adria Golf (to grow)
- Alpe-Adria „Tourism and leisure“ Tourism fair in Ljubljana  
**Tourism and leisure show** is the leading tourism event in the Alps–Adriatic region. JAKOB PRIZE (from 2011) for innovative tourist programmes. We propose to organise workshops and B2B events.
- Alpe-Adria Bikefestival (to grow)
- Hiking & Biking (to grow)
- Joint co-operation with media (TV shows, news, reports)





# Possibilities for cooperation in the future

- In the field of **joint marketing and promotional activities** in outbound markets (esp. overseas markets)
- Common development of **tourist products** (cross-border projects, etc.)
- **Joint investments** in tourism accommodation capacities and infrastructure
- Stronger co-operation in **MICE tourism**
- Mutual participation at the tourist events in other countries of the region
- Stronger co-operation of tourism industry (to stimulate by organising workshops, B2B events, etc.).

# TRAVEL TRENDS - next 20 years

**BACK TO NATURE**  
(NATURE PARKS, ACTIVE HOLIDAYS IN NATURE, HIKING, BIKING ETC.)

**MEDICAL TOURISM**  
(PRICE COMPETITIVE TREATMENTS)

**WELL-BEING** (AFTER A SHORT DOWNTURN IN TIME OF CRISIS, AGAIN WELLNESS)

**GREEN TOURISM**  
(ACCOMODATION, TRANSPORT, EXPERIENCES, LOCAL IS "IN" (WITHIN RANGE OF 10 KM FROM HOTELS))

## GLOBAL CHANGES:

- New media development
- Population aging
- Climate changes
- Economic crisis
- Growing competition in tourism



Changes in tourist behaviour



Marketing mix



## EVENTS IN SLOVENIA - INVITATION

Representatives of tourism industry and administration are invited every year to the tourist events being held in Slovenia:

- **ALPE – ADRIA „Tourism and leisure show“** (in January in Ljubljana)
- **SIW – Slovenian Incoming Workshop:** The most important tourist event in Slovenia. In 2014: 199 representatives from 132 Slovenian tourism companies met with 145 representatives from 111 foreign companies from 31 countries at SIW.
- **CONVENTA** – The Southeast European trade show for meetings, events & incentives. In 2015, more than 120 suppliers from South-East Europe and parts of Austria and Italy will be present at Conventa (in January in Ljubljana).

