



REPUBLIC OF SLOVENIA
MINISTRY OF ECONOMIC DEVELOPMENT
AND TECHNOLOGY

STRATEGY FOR THE SUSTAINABLE GROWTH OF SLOVENIAN TOURISM FOR 2017-2021

KEY EMPHASES

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ADOPTED BY THE GOVERNMENT OF THE REPUBLIC OF SLOVENIA,
5 OCTOBER 2017



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FOREWORD





ZDRAVKO POČIVALŠEK
Minister of Economic Development
and Technology

IT IS OUR DUTY TO MAKE GOOD DECISIONS.

Dear stakeholders in the Slovenian tourism industry and all those who are engaged in tourism in one way or another!

The new tourism strategy is the answer to how to achieve the objective that we set together, namely to increase international tourism receipts to EUR 3.7 – 4 billion.

Our vision is clear. Slovenia will become a green, active and healthy destination offering five-star experiences.

The strategy defines six key policies:

- a new organisational structure: macro destinations and tourism products;
- institutional and legal framework;
- accommodation, tourism infrastructure and investments;
- human resources in tourism industry;
- space, cultural and natural assets;
- small and medium-sized enterprises (SME).

The implementation of these policies and measures does not entirely depend on the Ministry of Economic Development and Technology. It depends on our joint intention, decision and activities.

We actively cooperated in drafting this strategy with all key stakeholders in the Slovenian

tourism industry – the representatives of the business sector, sectoral chambers, municipalities, civil society, institutes of education, experts in various fields, and representatives from ministries.

I believe that we have all agreed on how important tourism is and how essential it is that in light of our common goals we should all make our best efforts and blow some fresh wind in the sails of the tourism industry.

The situation analysis, conducted while drafting the new strategy, showed that the Slovenian tourism industry does not perform optimally. The numbers are still good, but in fact we are standing at a crossroads. Infrastructure is worn out, investments are poor, existing products have a low potential to contribute value added, and we are aware of the untapped development potential of human resources that are crucial for the strategy's implementation.

With this in mind we must make decisive moves and bolder decisions.

The present strategy is not only a snapshot of the current situation in the field or an inventory of what exists, but it clearly defines priorities.

Tourism is a typical cross-sectoral activity. With this in mind

we are counting on the support of other sectors. This time so much more. Individual ministries take part in all measures and even assume responsibility for delivering several of them.

I believe that in respect to many measures it would be easier to say they cannot be carried out or that they affect the existing systemic regulation. However, these measures are strategically important for the further development of tourism. If we join our forces, we will unlock the developmental potential and tourism will become an industry we can be legitimately proud of.

The goal we have set is ambitious but we believe it is achievable. Yet it will be impossible without wide stakeholder's support. Should the key measures of this strategy not be implemented, it is still realistic that in view of a moderate growth in tourist arrivals and overnight stays we achieve a growth in the amount of EUR 2.76 billion by 2021.

Even so, how can we be satisfied with this result if we have set a clear way forward for tourism with a growth target of between EUR 3.7 and 4 billion in revenues?

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**THE
STRATEGIC
VISION FOR
SLOVENIAN
TOURISM**



HIDDEN POTENTIALS

Global quality

Slovenia is the only country in the world offering experiences in exploring the lifestyles of the Mediterranean, the Alps, or the Pannonian Plain in a small geographical area in the very heart of Europe.

Sustainability and green context

Green, sustainable and responsible development is the pillar of Slovenian tourism, and all its stakeholders have committed themselves to these ideals. They provide support for the preservation and protection of natural and cultural assets and heritage, and for responsible and sustainable tourism revaluation.

The progressive value system

Slovenia is a safe, multicultural, tolerant and hospitable destination, which is of major importance for successful tourism development.

Geostrategic position

Slovenia is situated in the heart of Central Europe, among neighbouring countries that jointly generate more than EUR 173 million tourist visits and more than EUR 605 million overnight stays, which proves the region's high tourist attractiveness.

Willingness to make changes

A certain number of stakeholders in the public and private sectors have already adopted new visions and development philosophies oriented towards productive changes and improvements of the business environment – this will create new business potentials.

SLOVENIA'S TOURISM 2021 GROWTH TARGETS

Key target:
to increase international tourism receipts to EUR 3.7 – 4 billion.

Other targets:

- 5-5.5 million tourist visits;
- 16-18 million overnight stays;
- average length of stay 3.1-3.4 days;
- 18,000 to 22,000 new tourist rooms, of which 8,500 will be renovated and 6,500 will be new rooms in the hotel sector;
- to increase full-time employment in the tourism sector to 12,000 employees.

THE STRATEGIC VISION FOR SLOVENIAN TOURISM

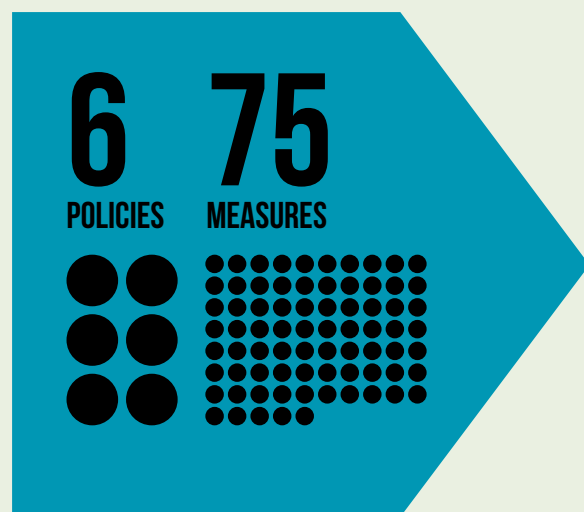
Slovenia is a global green boutique destination for demanding guests who are seeking a diverse and active experience, peace of mind and personal benefits.



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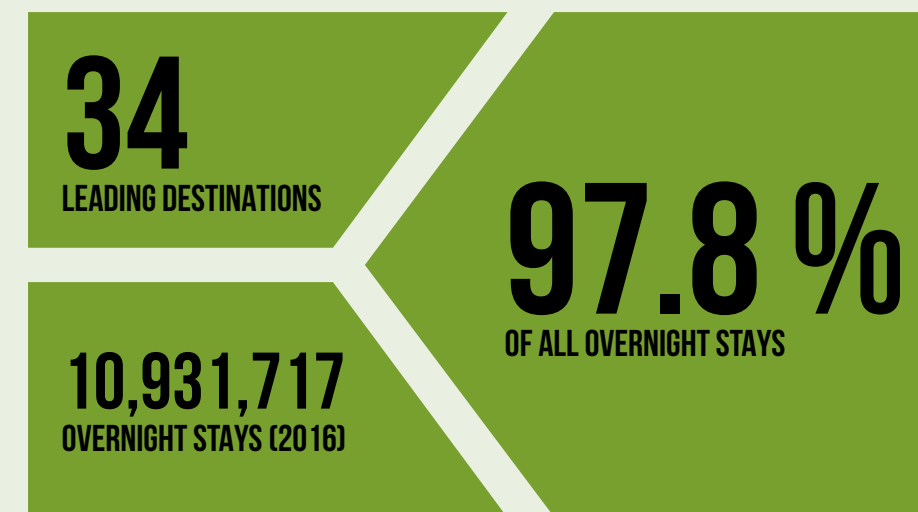
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DEVELOPMENT STRATEGY



The development strategy defines six key policies:

1. A NEW ORGANISATIONAL STRUCTURE: MACRO DESTINATIONS AND TOURISM PRODUCTS
2. INSTITUTIONAL AND LEGAL FRAMEWORK
3. ACCOMMODATION, TOURISM INFRASTRUCTURE AND INVESTMENTS
4. HUMAN RESOURCES IN TOURISM
5. SPACE, CULTURAL AND NATURAL ASSETS
6. SMALL AND MEDIUM-SIZED ENTERPRISES (SMES)



1. MACRO DESTINATIONS AND TOURISM PRODUCTS

MACRO DESTINATIONS

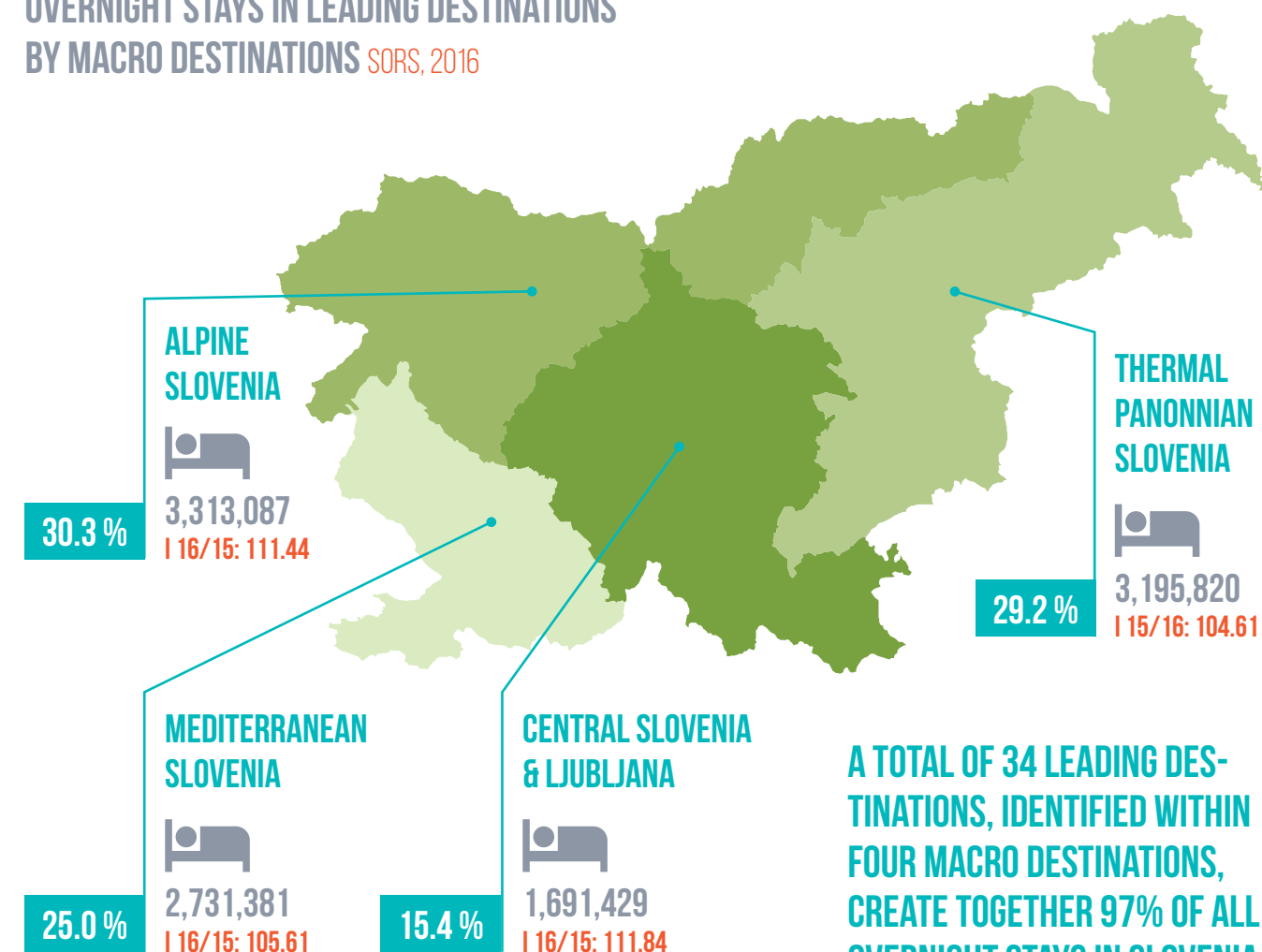
One of the fundamental conditions for success on the tourist market nowadays is a clear, simple and understandable communication of a country's uniqueness and distinguishing features. To this end market-driven clusters of tourism products and experiences or macro destinations are being created in Slovenia, which: (1) are based on geographically contiguous units (2) share the same or similar products or services, and (3) are visible at the global level.

Macro destinations have become a basis for strengthening a destination's identity and achieving synergies in the development of products and promotion, whereas, at the umbrella level, they contribute to a clearer and more focused marketing communication and positioning of Slovenia on foreign markets.

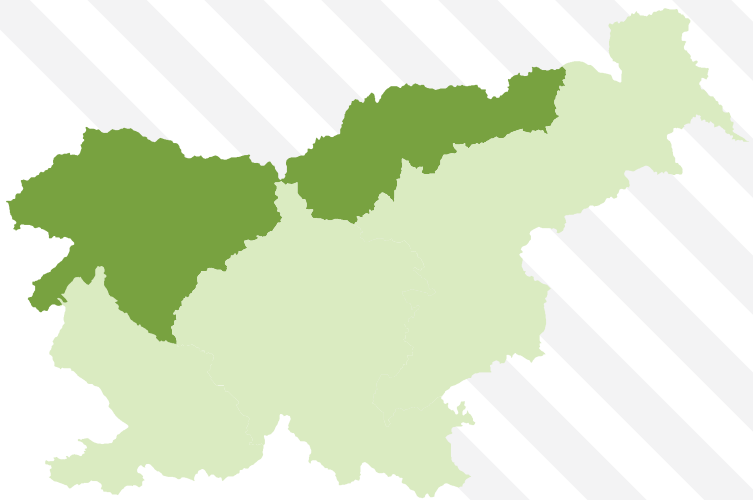
The strategy divides Slovenia into four macro destinations:

Mediterranean Slovenia,
Alpine Slovenia,
Thermal Pannonian Slovenia;
Central Slovenia & Ljubljana.

OVERNIGHT STAYS IN LEADING DESTINATIONS BY MACRO DESTINATIONS SORS, 2016



Alpine Slovenia



THE CHARACTER OF ALPINE SLOVENIA:
Picturesque and all-year-round active alpine vibe.
Alpine peaks, astonishing views, rivers, lakes and valleys, hiking and cycling routes, ski resorts and infrastructure provide the basis for year-round active holidays and outdoor adventures.

PRODUCTS

Key products	Secondary/ supporting products
HOLIDAYS IN THE MOUNTAINS (all year-round active holidays in the mountains for couples and families; outdoor adventures, activities, well-ness and relaxation)	GASTRONOMY
SPORTS TOURISM (an all year-round product for athletic team training; sporting events and European and World Championships)	EXPERIENCES in NATURE
OUTDOOR (all year-round active outdoor sports, such as cycling, hiking, water sports, skiing, etc. – as the main motive for visiting) – with emphasis on a particular outdoor activity as the main tourist motivation)	CULTURE
BUSINESS MEETINGS & EVENTS (all year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, including events attracting multi-day guests)	COUNTRYSIDE TOURISM
	TOURING
	GAMBLING

LEADING DESTINATIONS

- BLED
- KRANJSKA GORA
- SOČA VALLEY (BOVEC, TOLMIN, KOBARID)
- BOHINJ
- RADOVLJICA
- KRANJ
- MARIBOR (MARIBOR – POHORJE)
- ZREČE (ROGLA – POHORJE)
- UPPER SAVINJA VALLEY
- KOROŠKA

Mediterranean Slovenia



THE CHARACTER OF MEDITERRANEAN SLOVENIA:
Mediterranean diversity, the natural wonders of Karst.
Attractive and easily accessible Mediterranean towns with strong ties to the green Istrian countryside and underground world wonders, in symbiosis with culinary delicacies and premium wines.

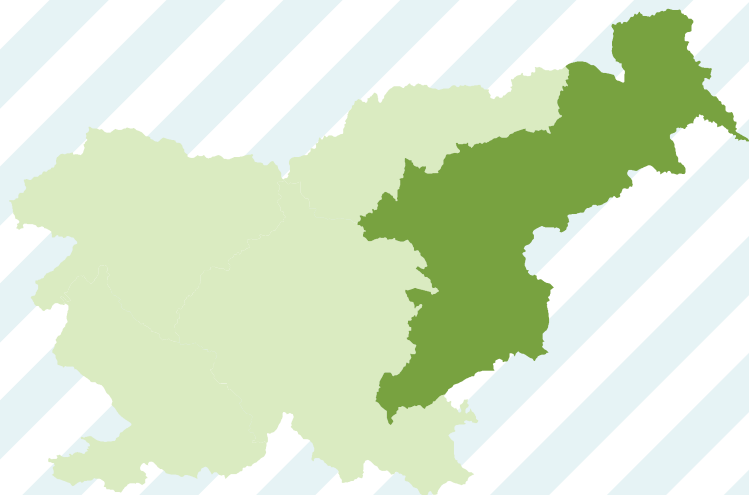
PRODUCTS

Key products	Secondary/ supporting products
BUSINESS MEETINGS & EVENTS (all year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, including supporting events that attract multi-day guests)	GAMBLING
SUN & SEA (a traditional seasonal Mediterranean product Sun & Beach, based on beaches, sun, swimming, relaxation, entertainment)	OUTDOOR
HEALTH & WELL-BEING (an all year-round product focusing on wellness, relaxation, selfness/mindfulness programmes and preventive therapies using natural therapeutic elements combined with the Mediterranean climate, speleotherapy, etc.)	EXPERIENCES in NATURE
GASTRONOMY (a combination of culinary heritage and modern solutions reflecting numerous features of the Mediterranean cuisine combined with Alpine and international culinary dishes and complemented with premium wines and wine production)	CULTURE
	COUNTRYSIDE TOURISM
	TOURING
	SPECIAL INTERESTS
	CRUISING & YACHTING

LEADING DESTINATIONS

- PORTOROŽ/PIRAN
- IZOLA
- KOPER
- ANKARAN
- POSTOJNA CAVE/ POSTOJNA (KARST)
- LIPICA AND THE ŠKOCJAN CAVES (KARST)
- NOVA GORICA AND THE VIPAVA VALLEY
- BRDA

Thermal Pannonian Slovenia



THE CHARACTER OF THERMAL PANNONIAN SLOVENIA:

Relaxation, health and filling with energy.

This romantic mosaic of plains, hills, vineyards, and castles crisscrossed by thermal springs is an excellent choice for those looking for health, relaxation, active holidays and culinary delights cooked with love.

PRODUCTS

Key products	Secondary/ supporting products
HEALTH & WELL-BEING (an all year-round product focusing on health, preventive therapies, wellness, relaxation, and thermal spa adventures for visitors of all ages)	OUTDOOR EXPERIENCES in NATURE CULTURE SPECIAL INTERESTS (vineyard cottages, archaeological tourism, pilgrimage tourism, etc.)
GASTRONOMY (hearty gastronomy based on local production and recipes and complemented with delicious wines and beer)	
COUNTRYSIDE TOURISM (all year-round tourism based on what tourist farms offer, small providers and vineyard cottages, and authentic rural experiences)	

LEADING DESTINATIONS

- MORAVSKE TOPLICE, RADENCI, LENDAVA (POMURJE)
- PTUJ
- TOPOLŠICA/ŠOŠTANJ AND VELENJE (THE ŠALEK VALLEY)
- LAŠKO
- CELJE
- PODČETRTEK
- ROGAŠKA SLATINA
- DOBRNA
- ČATEŽ (POSAVJE)
- NOVO MESTO, ŠMARJEŠKE TOPLICE AND DOLENJSKE TOPLICE (DOLENJSKA)

Central Slovenia & Ljubljana



THE CHARACTER OF CENTRAL SLOVENIA & LJUBLJANA:

The lively capital of Ljubljana with untouched natural surroundings at your fingertips – where culture and nature meet.

Culture and art, thousands of outstanding theatrical and street performances and events, shopping, and a dynamic urban culinary scene, with pristine woods and hills just a few steps away, offering a wide range of activities and authentic experiences in the countryside.

PRODUCTS

Key products	Secondary/ supporting products
BUSINESS MEETINGS & EVENTS (all year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, including supporting events that attract multi-day guests)	OUTDOOR EXPERIENCES in NATURE SHOPPING SPECIAL INTERESTS GAMBLING
TOWNS & CULTURE (city breaks, rich history, festival and performance events, contemporary and alternative arts, town discovering)	
TOURING (Ljubljana as a town for discovering macro destination and Slovenia)	
GASTRONOMY (a combination of urban and countryside cuisines)	

LEADING DESTINATIONS

- LJUBLJANA (THE REGION OF CENTRAL SLOVENIA)
- KAMNIK
- CERKLJE NA GORENJSKEM
- BELA KRAJINA
- KOČEVSKO
- ŠKOFJA LOKA (THE POLJANE AND SELCA VALLEYS)
- IDRIJA

DEFINITION OF TOURISM PRODUCTS

At the national level ten leading (primary) tourism products have been identified as key products in particular experiential macro destinations.

These are, as follows:

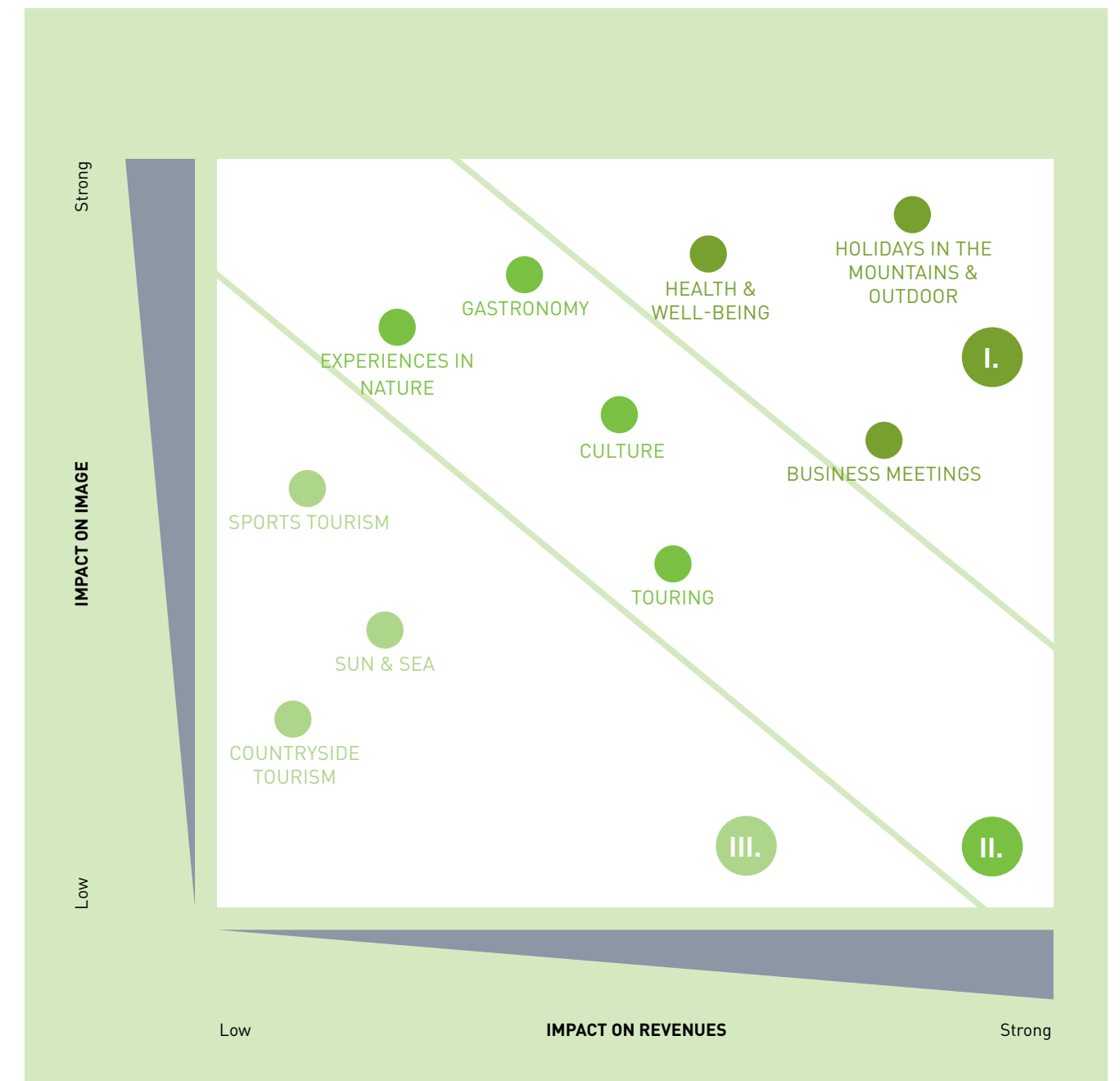
- Holidays in the Mountains and Outdoors,
- Business Meetings & Events,
- Health & Well-being,
- Experiences in Nature
- Gastronomy,
- Culture,
- Sun & Sea,
- Sports Tourism,
- Touring and
- Countryside Tourism.

SOČA



THE MOST IMPORTANT TOURISM PRODUCTS IN TERMS OF THEIR IMPACT ON REVENUES AND IMAGE.

- | | | |
|---|--|---|
| <p>I.</p> <p>The most important products in terms of their impact on revenues and image. Promotional support, active product development and management at the national level:</p> <ul style="list-style-type: none"> • HOLIDAYS IN THE MOUNTAINS & OUTDOOR • HEALTH & WELL-BEING • BUSINESS MEETINGS | <p>II.</p> <p>Products having a strong impact on revenues and image</p> <ul style="list-style-type: none"> • EXPERIENCES in NATURE • GASTRONOMY • CULTURE • TOURING | <p>III.</p> <p>Products having a minor impact on revenues and image</p> <ul style="list-style-type: none"> • SPORTS TOURISM • SUN & SEA • COUNTRYSIDE TOURISM |
|---|--|---|



2. INSTITUTIONAL AND LEGAL FRAMEWORK

This measure aims to strengthen the role of the national tourist organisation, which will assume new tasks of coordinating macro destinations in terms of marketing and expanding the competences of the Tourism Directorate at the Ministry of Economic Development and Technology, which has been tasked with drafting development guidelines for these four key macro destinations. Other legislative measures stated below are also of essential importance in this context.

LJUBLJANA



MEASURES:

DESTINATION MANAGEMENT

- Slovenian Tourist Board (STB) strengthens its role as the national tourist organisation (NTO)
- Increasing the competencies of the Tourism Directorate
- Increasing the activities undertaken by SPIRIT (Public Agency for Entrepreneurship, Internationalization, Foreign Investments and Technology) as a promotor of investment opportunities in the tourism industry
- Introducing new vertical and horizontal links within the tourism management system

TOURIST TAX MODERNISATION

- Increasing the tourist tax
- Distributing the tourist tax

MODERNISATION OF LEGISLATION GOVERNING ACCOMMODATION

- Formal acknowledgement of glamping and other innovative forms of accommodation in the great outdoors as a type of accommodation
- Introducing the 'Hotelstars' classification system
- Modernising legislation governing accommodation

SIMPLIFICATION OF GUIDELINES ON GOOD HYGIENE PRACTICES AND APPLICATION OF THE HACCP PRINCIPLES IN THE HOSPITALITY INDUSTRY

REGULATION OF MOUNTAIN-BIKING IN NATURAL ENVIRONMENTS

- Amendments to legislation to enable mountain-biking in natural environments
- Drafting the action plan to implement the legislation governing mountain-biking

REGULATION OF THE SYSTEM FOR MARKING THEMATIC HIKING TRAILS

- Review of the existing thematic hiking trails
- Financing for the maintenance of mountain trails

OUTDOOR SPORTS TRAINING

- Setting up a watersports training system
- Providing conditions for leisure activities with an increased level of risk

INCLUSION OF CABLEWAY INSTALLATIONS IN PUBLIC PASSENGER TRANSPORT

- Legislative arrangements to include passenger cableways in public passenger transport
- Amending the legislation regulating passenger cableway installations in accordance with the new EU-legislation

SAFETY IN TOURISM

- Maintaining the level of safety in tourism

3. ACCOMMODATION, TOURISM INFRASTRUCTURE AND INVESTMENTS

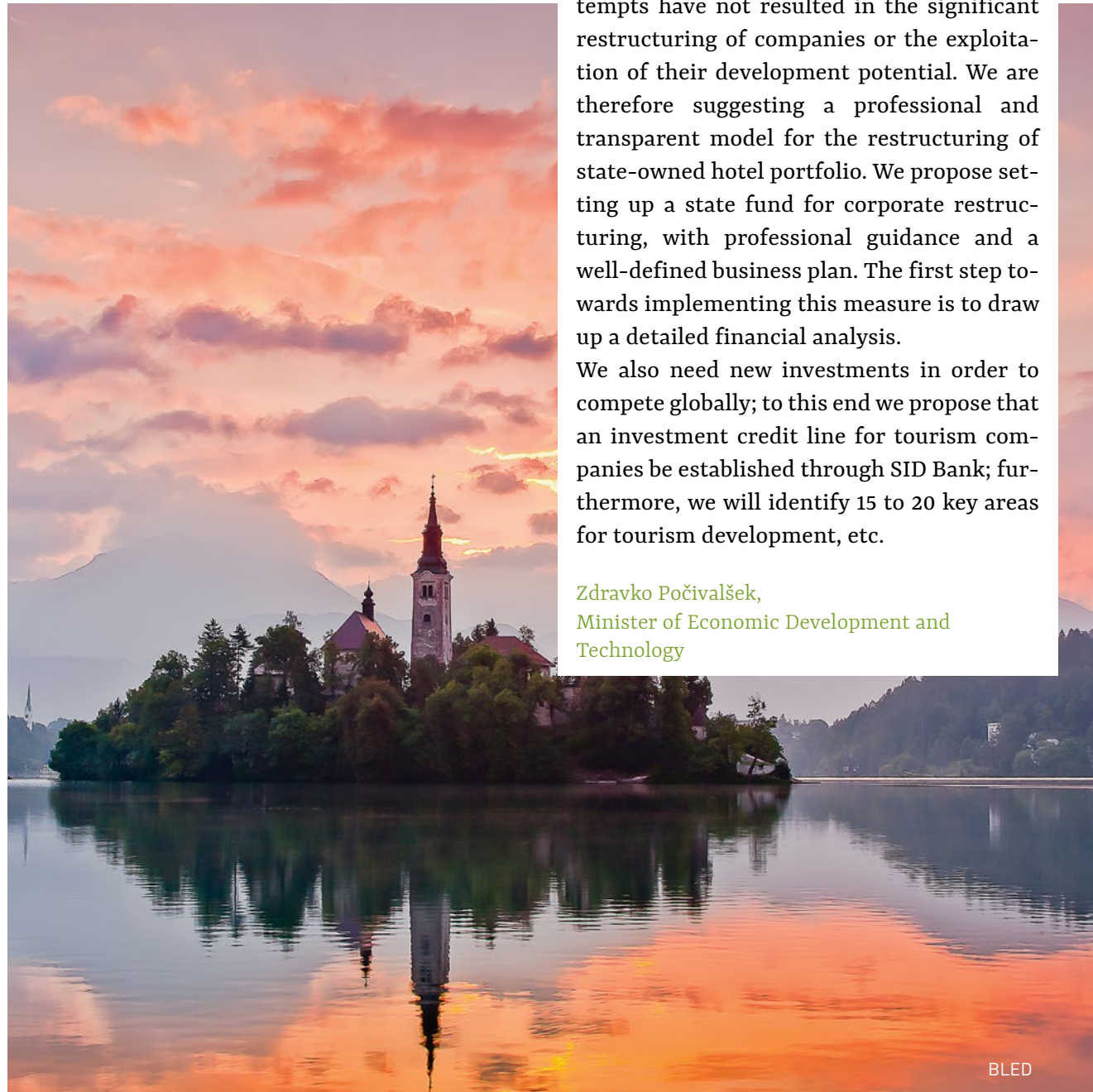
Slovenian tourism needs to undergo a major restructuring with the renovation of tourism infrastructure. The infrastructure should be based on high-quality and innovative tourism products that will have a positive impact on the occupancy of accommodation capacities and will increase guest's level of daily spending.

One of the key policies is the investment policy, on which it depends whether our goals will be achieved and whether the Slovenian tourism industry will make a breakthrough or remain at a standstill. We need to resolve the issues relating to the restructuring of state-owned companies, new greenfield investments and incentives such as loans, reliefs, and grants.

So far rehabilitation and privatisation attempts have not resulted in the significant restructuring of companies or the exploitation of their development potential. We are therefore suggesting a professional and transparent model for the restructuring of state-owned hotel portfolio. We propose setting up a state fund for corporate restructuring, with professional guidance and a well-defined business plan. The first step towards implementing this measure is to draw up a detailed financial analysis.

We also need new investments in order to compete globally; to this end we propose that an investment credit line for tourism companies be established through SID Bank; furthermore, we will identify 15 to 20 key areas for tourism development, etc.

Zdravko Počivalšek,
Minister of Economic Development and
Technology



BLED

MEASURES:

RESTRUCTURING OF STATE-OWNED HOTEL COMPANIES WITH INVESTMENT AND MANAGEMENT PLANS

- Conducting a detailed financial analysis
- Setting up a state fund for corporate restructuring (under the auspices of the Slovenian Sovereign Holding – SSH)
- Ownership consolidation
- Structuring a new portfolio

NEW INVESTMENTS IN HOTEL AND HOLIDAY RESORT CAPACITIES

- Determining 15 to 20 key projects for the development of hotels and holiday resorts
- Determining incentives
- Creating promotional booklets to attract investments

STRATEGIC INVESTMENT PROJECTS

- Drafting an instrument for strategic projects in tourism

INCENTIVE SCHEMES FOR THE DEVELOPMENT OF TOURISM AND HOTEL SECTORS

- Establishing an investment credit line for tourist companies
- A system for the absorption of grants for tourism

PROMOTING THE DEVELOPMENT OF SMES

- A system for the allocation of funds to SMEs
- Favourable credit lines for SMEs

MASTER PLANS AND MARKETING PLANS FOR MACRO-REGIONS

- Developing individual master plans for macro-regions
- Developing marketing plans for macro-regions

EU-FUNDS/NATIONAL FUNDS TO IMPROVE TOURISM INFRASTRUCTURE

- Providing grants at the national, local and EU levels for investments in tourism infrastructure
- Increasing the absorption of EU-funds for investments in intangible assets in tourism

SMART MOBILITY

- Including public passenger transport in Slovenian tourism
- Developing urban smart cards
- Projects for calming traffic in tourist destinations and the development of alternative solutions

4. HUMAN RESOURCES

Human resources are one of the most important untapped development potentials of Slovenian tourism. Measures in this field are organised into three levels: formal education measures, measures to promote on-the-job education, and measures to create a model for promoting appropriate staffing policies. The close cooperation of all stakeholders is of vital importance for the measures to be implemented effectively.



MEASURES:

► VOCATIONAL EDUCATION IN THE HOSPITALITY AND TOURISM INDUSTRIES

- Introducing new school hotels
- Updating standards and specialisations in vocational education

► TERTIARY-LEVEL EDUCATION PROGRAMMES

- Establishing a business programme for the hotel industry
- Strengthening programmes for middle management in tourism
- Improving the data capture system for tourism needs

► PROMOTION OF VOCATIONAL EDUCATION IN TOURISM

- Improving the image of tourism professions

► ON-THE-JOB EDUCATION IN TOURISM

- Setting up a national centre for on-the-job education in tourism
- Providing education for small, specialised hotels
- Strengthening the knowledge of information and communication technology (ICT)

► DEVELOPMENT OF A MODEL FOR PROMOTING APPROPRIATE HUMAN RESOURCES POLICY

”

Tourism is a service industry, which is why it needs motivated, professional and committed employees to achieve our vision. We must make changes with regard to formal education, on-the-job training and the promotion of professions and, above all, we must raise the prestige of occupations in the hospitality and tourism industries. It is essential that we encourage the appropriate human resources management policy, systematically invest in educating employees and introduce a system for promotions and incentives.

Only this way will we be able to translate this respectful attitude into high-quality services for guests, which is crucial to achieve the goals that we have set in this strategy.

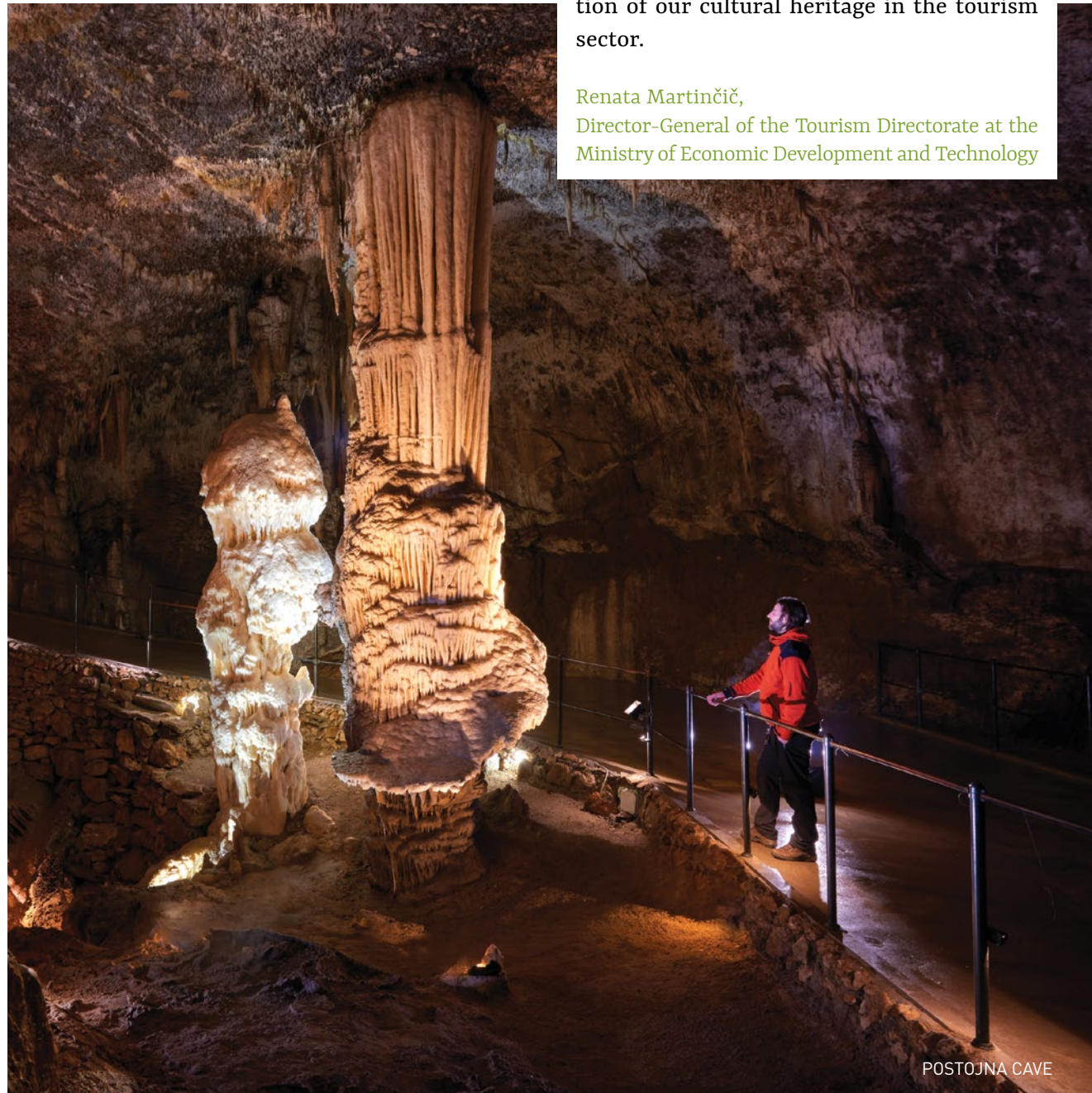
Eva Štravs Podlogar,
State Secretary of the Ministry of Economic
Development and Technology

5. SPACE, CULTURAL AND NATURAL ASSETS

The tourism development policy focuses on sustainable (green) growth and on closing two gaps: a gap between tourist green potential and its economic turnover, and a gap between the 'green' promise and the actual quality of tourist experience.

” The development of Slovenian tourism is based on sustainability. This is a key building block that we firmly rely on, even though this strategy is more business-oriented. We will define specific tourism development areas, thus committing ourselves to the development of tourism in those areas with the greatest tourism potential. We will pursue our activities in this field along with the Green Scheme of Slovenian Tourism and will strive to achieve a high valuation of our natural assets and the widest possible integration of our cultural heritage in the tourism sector.

Renata Martinčič,
Director-General of the Tourism Directorate at the
Ministry of Economic Development and Technology



POSTOJNA CAVE

MEASURES:

DEFINING SPECIFIC TOURISM DEVELOPMENT AREAS

- Defining specific areas (destinations) for the development of tourism

DRAFTING A NATIONAL PLAN FOR GREEN (SUSTAINABLE) TOURISM

- Ratification of international conventions regarding sustainable tourism development
- Drafting a plan for the integration of UNESCO world heritage in tourism
- Promotion of green international connections

INTRODUCING THE MONITORING OF TOURISM DEVELOPMENT IN TERMS OF TOURIST AND VISITOR SATISFACTION

- Monitoring visitor satisfaction
- Monitoring resident satisfaction regarding the development of tourism

ESTABLISHING A SUSTAINABLE MODEL FOR VISITOR MANAGEMENT

- Analysis of the carrying capacities of tourist destinations in Slovenia and putting in place management models

FURTHER DEVELOPMENT OF THE GREEN SCHEME OF SLOVENIAN TOURISM (GSST) AND THE SLOVENIA GREEN BRAND

- Active management of the GSST
- Green monitoring of the new categories of the GSST service providers
- Promoting the design of green scheme products and their commercialisation
- Producing an analysis of climate change impacts on the development of Slovenia's tourism

VALUATION OF NATURAL ASSETS

- Drafting a plan for the development of tourism in Slovenia's protected areas

INTEGRATION OF CULTURAL HERITAGE

- Drafting a plan for the inclusion of cultural heritage and comprehensive integration in tourism
- Involvement of private partners in the cultural heritage of Slovenian castles
- Involvement of private partners in industrial heritage

6. SMALL AND MEDIUM-SIZED ENTERPRISES

Several measures have been envisaged for the development of SMEs and unlocking their potential. The aim is to improve the business environment for tourist companies and tourist farms, promote the development of specialised smaller service providers, and strengthen the range of culinary services.

KOROŠKA



MEASURES:

► SMALL HOTELS AND OTHER SMALL TOURIST COMPANIES

- Improving the administrative framework and business environment for small tourist companies and tourist farms

► VALUATION OF CUISINE

- The 'Gostilna Slovenija' trademark
- Product development activities and the promotion of cuisine under the brand 'Taste Slovenia' through strengthening the vertical link to regional/local culinary brands
- Establishing culinary diplomacy and supporting the international visibility of Slovenian cuisine
- Healthy food in the hospitality sector and its promotion

► SETTING UP A MODEL FOR THE INTEGRATION OF TOURISM, AGRICULTURE, CRAFTS, DESIGNS AND CREATIVE ACTIVITIES

- Branding souvenirs, products, craft and design products from Slovenia

I FEEL
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4

MARKETING OF SLOVENIAN TOURISM



MARKETING OF SLOVENIAN TOURISM

The efficient marketing strategy is a key pillar in achieving strategic objectives.

” Slovenia is a global green boutique destination for demanding guests who are seeking a diverse and active experience, peace of mind, and personal benefits. Its marketing strategy introduces the measures aimed at efficient marketing and promoting Slovenia as a green, active and healthy tourist destination offering five-star experiences, through which Slovenian tourism strives to increase added value and revenues from travel exports.

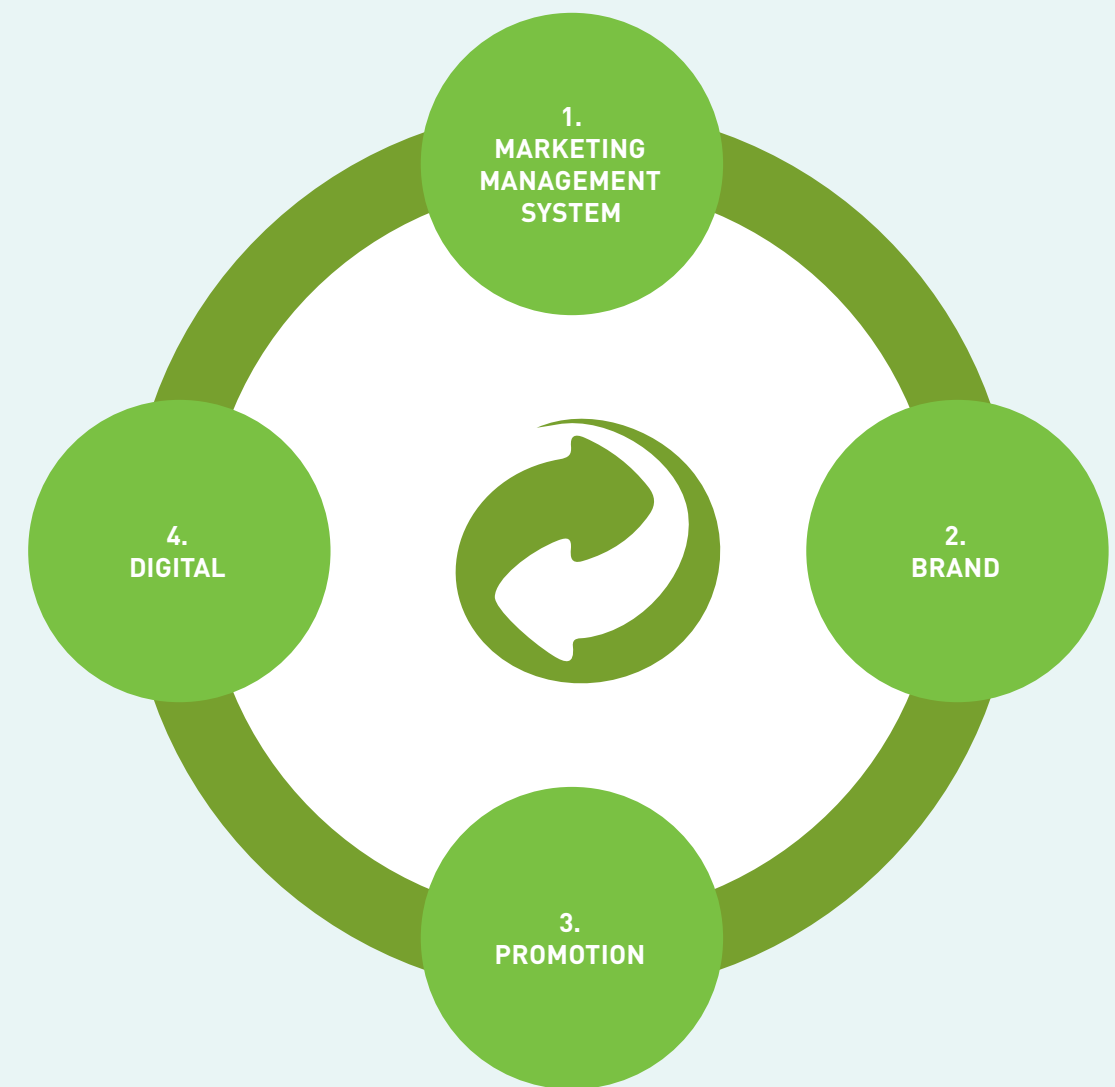
Maja Pak,
Director of the Slovenian Tourist Board



Based on strategic objectives, the strategy pursues five marketing objectives:

- to improve the image of Slovenian tourism;
- to maintain a high level of tourist satisfaction;
- to focus on target segments (Slovenia as a global destination);
- to increase visibility;
- to facilitate conversions (from awareness of the brand to willingness to make a purchase).

STRATEGIC MARKETING CONCEPT THROUGH FOUR DEVELOPMENT AREAS



Four development areas (policies) of marketing comprise nine key measures and activities:

• A MARKETING MANAGEMENT SYSTEM

- Transformation of the marketing management system

• BRAND

- Development of a new communication platform (i.e. great idea)

• PROMOTION

- Focus placed on priority markets – in accordance with priority groups of markets (guidelines for the allocation of funds)
- Drafting development plans for markets and initiatives for identifying additional opportunities
- Focus placed on the marketing of key products on key markets in view of the defined product/market matrix
- Increasing the effectiveness of promotion channels
 - Further strengthening digital channels by increasing funds to at least 39% of the entire budget by 2021, an integrated marketing communication approach and an integrated approach to the allocations of funds across the entire promotional website
 - Enhancing coherence across individual promotion channels through a new communication platform
 - Use of ROMI (Return on Marketing Investment)/BSC (Balance Score Card) approach in marketing plans
 - Development and implementation of the B2B measures
 - Newflight connections

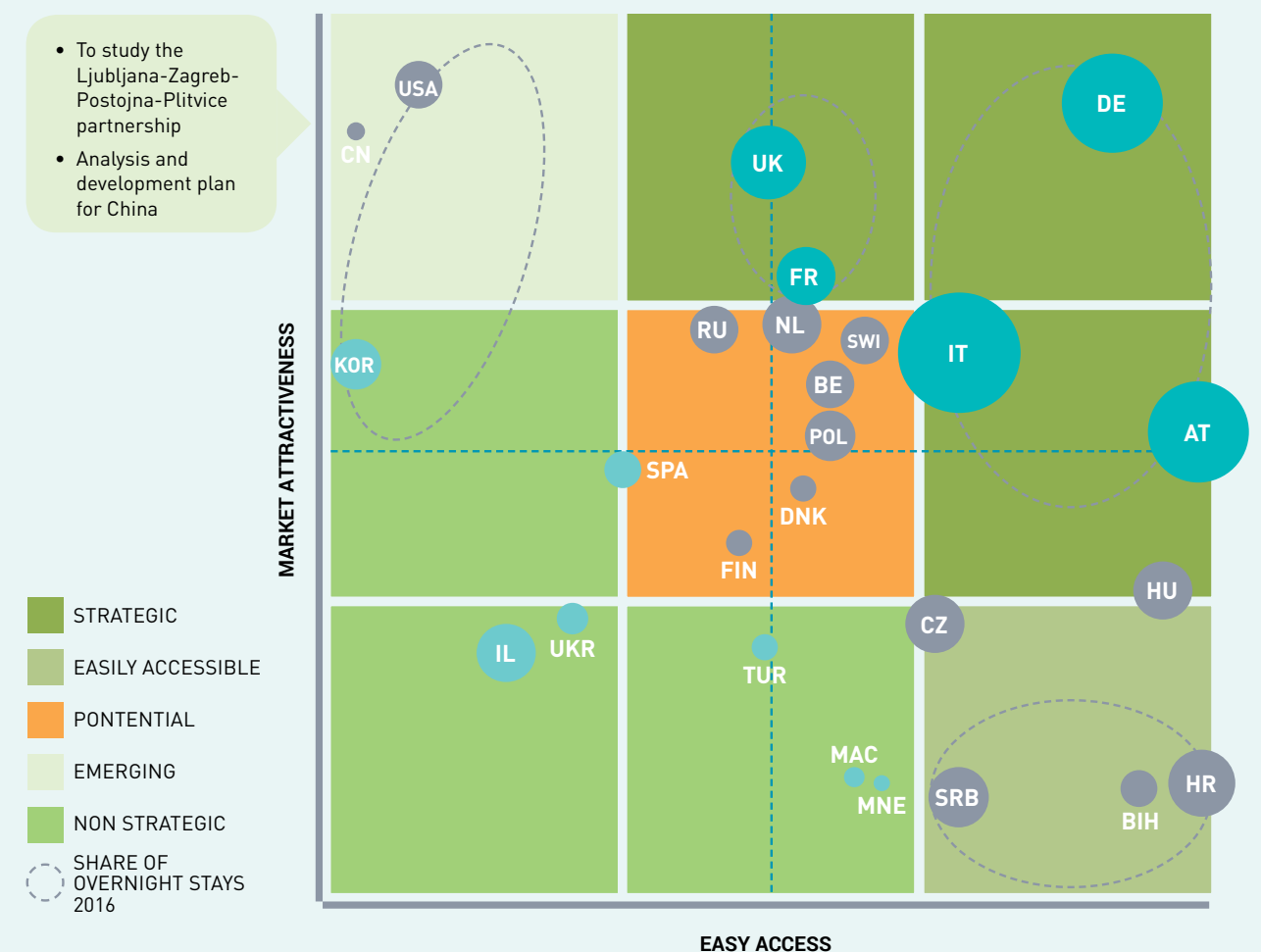
• DIGITAL

- Improving the digital marketing at contact points on the purchase route
- Using a digital purchase path for continuous improvement of the user experience
- Implementing initiatives for digital enhancements

SLOVENIA'S PRIORITY MARKETS FOR TOURISM

The determination of priority markets provides a basis for the allocation of resources (human, financial investments, time). On the basis of the conducted analysis markets have been identified as primary (Austria, Germany, Italy), emerging (Great Britain and France), potentially emerging (Benelux, Switzerland, Denmark, Finland, Poland, the Russian Federation, Hungary, and the Czech Republic) and markets that have a high-value return on resources invested (Croatia, Serbia, BiH).

THE MODEL FOR IDENTIFYING PRIORITY MARKETS IN TERMS OF THEIR ATTRACTIVENESS AND ACCESSIBILITY



FOCUS PLACED ON MARKETING KEY PRODUCTS ON KEY MARKETS

The product/market matrix has been developed on the basis of the identification of priority markets and key products. It determines which products are to be marketed as a priority on individual markets.



CONSIDERED IN THE MARKETING PLAN FOR A MACRODESTINATION

PROMOTION OF PRODUCTS FOR KEY MARKETS – PRIORITY LEVEL

PRIMARY SECONDARY TERTIARY

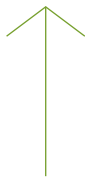
		AUSTRIA	GERMANY	ITALY	THE NEATHER- LANDS	GB	CROATIA	RUSSIA	FRANCE
1.	HOLIDAYS IN THE MOUN- TAINS & OUTDOOR	II	I	I	I	I	I	III	II
1.	HEALTH & WELL-BEING	I	II	I	III	III	I	I	III
1.	BUSINESS MEETINGS	UNDER THE RESPONSIBILITY OF THE SLOVENIAN CONVENTION BUREAU							
2.	GASTRONOMY	I	I	I	II	I	II	I	I
2.	EXPERIENCES IN NATURE	I	I	II	I	II	II		II
2.	CULTURE	II	II	II	II	II	II	II	I
2.	TOURING	II	II	III		II		II	I
3.	SUN & SEA	II	III	II	II	III		I	III
3.	SPORTS TOURISM	III	III	III			III		
3.	COUNTRYSIDE TOURISM	III	III	III			III		

INCREASING THE EFFECTIVENESS OF PROMOTION CHANNELS

With a view to increasing the effectiveness of promotion channels, four main activities have been identified:

- ▶ Further strengthening digital channels by increasing funds to at least 39% of the entire budget by 2021 while putting into effect an integrated marketing communication approach and an integrated approach to the allocation of funds across the entire promotional website;
- ▶ Using a new communication platform to increase coherence across individual promotion channels;
- ▶ Using the ROMI (Return on Marketing Investment) approach in marketing plans;
- ▶ Development and implementation of B2B measures (the development of a model to increase accessibility by air, education and human resources development, increasing quality in marketing research and the provision of necessary information to B2B partners, staying abreast of business event programmes (fairs, stock exchanges, workshops, etc.), and adjusting to strategic objectives).

COMMON KINGFISHER



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SLOVENIA**

5

**THE SCENARIO
OF THE ACCELERATED
DEVELOPMENT
OF SLOVENIAN
TOURISM**



THE STRATEGY PUTS FORWARD TWO POSSIBLE SCENARIOS FOR FURTHER GROWTH OF SLOVENIAN TOURISM:

- the scenario of Slovenia's current tourism growth rate continuing;
- the scenario of the accelerated sustainable development of Slovenian tourism.

The first scenario is passive, based on the 2008–2015 development trends, and envisages minor changes in the current tourism system. According to this scenario a currency inflow of EUR 2.76 billion would be generated from the export of travels by 2021.

The second scenario envisages accelerated development based on the proactive approach of the competent ministries to support tourism development. It builds on a quick, responsible and efficient action and provides support to entrepreneurial tourism initiatives.

The second scenario is the one in which we believe and to whose implementation we are committed.

THE SCENARIO OF THE ACCELERATED SUSTAINABLE DEVELOPMENT OF SLOVENIAN TOURISM.

IT ENVISAGES THE FOLLOWING:

- major investments in higher-category accommodation facilities (new investments and renovations), which will facilitate a transition into a segment of visitors with higher levels of income, provide a basis for price increases, and, consequently, improved business results produced by visitors' increased tourist spending,
- improving the quality of the entire tourism infrastructure and tourism products with emphasis on well-motivated and professional human resources;
- legislation and regulations in favour of tourism industry development;
- considerably improving the image of Slovenian tourism;
- increasing the occupancy of tourism capacities and, as a result, increasing the number of overnight stays by 6–8% on average per year;
- increasing tourist spending per overnight stay by 7–10% on average per year;
- EU funds or national funds for the accelerated development of tourism infrastructure and products;
- efficient and consistent implementation of policies and measures proposed in this strategy.



THE SCENARIO OF THE ACCELERATED DEVELOPMENT OF SLOVENIAN TOURISM - 2021

Category of visitors	Type of accommodation	Rooms (number)	Permanent beds (number)	Overnight stays – total	Beds (percentage)	Overnight stays – total		Beds (occupancy)	Foreign overnights (percentage)	Foreign overnights (A) Foreign visitors (B,C)	Average daily spending by foreign visitors (in EUR)	Tourism exports (in EUR)	Tourism exports (percentage)
A. Tourists	Hotels	28,844	58,444	2,0	40%	10,135,694		48%	76%	7,714,741	162	1,252,433,644	34%
	Greenfield	6,500	13,170			2,259,394		47%	80%	1,807,515	170	307,277,621	
	Brownfield	8,500	17,223			3,268,911		52%	75%	2,451,683	160	392,269,303	
	Other	13,844	28,051			4,607,389		45%	75%	3,455,542	160	552,886,720	
	Camps	9,697	30,403	3,1	21%	1,997,488		18%	70%	1,398,242	78	109,062,841	3%
	Private accommodation	8,089	25,353	3,1	17%	2,218,506		20%	65%	1,442,029	93	134,108,693	4%
	Other	9,393	32,350	3,4	22%	1,587,137		16%	44%	698,340	93	64,945,638	2%
	Total A	56,023	146,551	12	1	15,938,825		30%	71%	11,253,351	139	1,560,550,815	42%
B. Same-day										33,481,559	44	1,486,238,871	40%
C. Transit										37,329,027	18	668,807,492	18%
	Total B+C									70,810,587	30	2,155,046,363	58%
TOTAL	Total A+B+C										169	3,715,597,178	100%

Note: The tourists in the table refer to overnight visitors versus same-day visitors (excursionists) and transit passengers.

Source: a simulation of the data obtained from Statistical Office of the Republic of Slovenia (SURS), Bank of Slovenia (2017), and the Slovenian Tourist Board (STB) (2017).

SLOVENIA IS EXPECTED TO ACHIEVE THE FOLLOWING RESULTS IN 2021:

- 11,900 new rooms, which is a 27% increase compared to the 2015 base year;
- 30,098 new beds, which is a 26% increase compared to the 2015 base year;
- an increase in the total number of overnight stays by 5.6 million, i.e. a 54% increase compared to the 2015 base year;
- an increase in the average occupancy rate of accommodation capacities by 23% due to improved destination image;
- a 9% increase in the average spending by foreign visitors per night;
- a rise in the number of same-day visitors by 6% on average per year and a rise in the visits of transit guests by 0.5% on average per year;
- an increase in the average consumption of same-day visitors by 13% and transit passengers by 33%;
- a total of EUR 3.7 billion of revenue from the export of travels, which means an increase of 8.7% on average per year and a slightly higher share of revenues from foreign overnight visitors – 42%.



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