

The background is a solid, vibrant red. In the upper right quadrant, there is a cluster of several wooden spinning spindles of various sizes and shapes, some with white thread wound around them. In the lower right quadrant, there is a large, intricate white lace doily with a complex geometric pattern. The text is overlaid on the left side of the image.

I FEEL
SLOVENIA

Slovenian Tourism Board Work Programme 2018/2019

September 2018

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Kot zakoniti zastopnik Javne agencije Republike Slovenije za trženje in promocijo turizma, Dimičeva 13, 1000 Ljubljana (v nadaljevanju STO), v skladu s 36. členom Zakona o javnih agencijah (Ur.l. RS, št. 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C) podajam

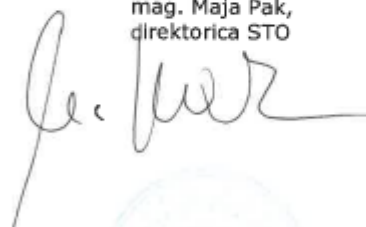
IZJAVO,

da ima STO sprejet dokument »**STRATEGIJO RAZVOJA SLOVENSKE TURISTIČNE ORGANIZACIJE ZA OBDOBJE 2016 – 2020**«, ki v svoji vsebini kot vodilna institucija za razvoj in trženje slovenskega turizma opredeljuje:

- doprinos k poslovni uspešnosti slovenskega turizma in njegove konkurenčnosti,
- ukrepe za izboljševanje konkurenčnosti gospodarstva nasploh in podobo ter ugled Slovenije kot države,
- zagotavljanje kvalitetnih storitev v odnosu do javnosti in uporabnikov,
- ukrepe za zagotavljanje učinkovite porabe sredstev ter
- ukrepe za zagotavljanje učinkovite kadrovske politike.

Julij 2016

mag. Maja Pak,
direktorica STO



SL	EN
STO SLOVENSKA TURISTIČNA ORGANIZACIJA	STB SLOVENIAN TOURIST BOARD
Kot zakoniti zastopnik Javne agencije Republike Slovenije za trženje in promocijo turizma, Dimičeva 13, 1000 Ljubljana (v nadaljevanju STO), v skladu s 36. členom Zakona o javnih agencijah (Ur. l. RS, št. 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C podajam	As the legal representative of the Public Agency of the Republic of Slovenia for the Marketing and Promotion of Tourism, Dimičeva 13, 1000 Ljubljana (hereinafter: STB), pursuant to Article 36 of the Public Agencies Act (Official Gazette of the Republic of Slovenia [Uradni list RS], No 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C), I hereby issue this
IZJAVO,	STATEMENT
da ima STO sprejet dokument » STRATEGIJO RAZVOJA SLOVENSKE TURISTIČNE ORGANIZACIJE ZA OBDOBJE 2016 – 2020 «, ki v svoji vsebini kot vodilna institucija za razvoj in trženje slovenskega turizma opredeljuje:	declaring that the STB has also adopted the document “ 2016–2020 STRATEGY FOR THE DEVELOPMENT OF THE SLOVENIAN TOURIST BOARD ” which, in its content, as the leading institution for the development and marketing of Slovenian tourism, defines:
- doprinos k poslovni uspešnosti slovenskega turizma in njegove konkurenčnosti,	- the contribution to the business performance of Slovenian tourism and its competitiveness,
- ukrepe za izboljševanje konkurenčnosti gospodarstva nasploh in podobo ter ugled Slovenije kot države,	- the measures for improving the competitiveness of the economy in general and the image and reputation of Slovenia as a country,
- zagotavljanje kvalitetnih storitev v odnosu do javnosti in uporabnikov,	- the provision of high-quality services to the public and users,
- ukrepe za zagotavljanje učinkovite porabe sredstev ter	- the measures for ensuring the effective use of funds, and
- ukrepe za zagotavljanje učinkovite kadrovske politike .	- the measures for ensuring an effective human resource policy.
mag. Maja Pak, direktorica STO	Maja Pak, Director of the Slovenian Tourist Board
Julij 2016	July 2016
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1. INTRODUCTION

A NEW STRATEGIC PERIOD AND THE NEW JOINT TOURISM STRATEGY

In 2017, the Ministry of Economic Development and Technology carried out an important process of drafting a new strategic document that defined the key challenges of Slovenian tourism and formed clear priorities of operating at all levels by the year 2021. The 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism was created in cooperation with all key stakeholders of Slovenian tourism: representatives of the economy, chambers, destinations, product associations, the non-governmental sphere, educational institutions, experts in various fields, and representatives of ministries; the Slovenian Tourist Board was also closely involved in the process and actively co-created it. The Strategy is a coordinated document of all those working in Slovenian tourism, it has a clear vision for Slovenia to become a green, active, and healthy destination for five-star experiences. The document also presents fundamental strategic definitions for the Slovenian Tourist Board – the key marketing guidelines that it defines have already been included in the 2018/2019 Work Programme of the Slovenian Tourist Board.

GOOD RESULTS, BUT SLOVENIAN TOURISM STILL FACES MANY CHALLENGES

In its analysis, the Strategy had a clear message: Slovenian tourism is not in its optimum condition. The numbers are increasing, but we are actually at a crossroads. By means of a new vision for tourism, policies, and strategic goals, Slovenia is making efforts to significantly increase the added value of tourism and the achievement of sustainable growth, and it has a key target by 2021 – this is EUR 3.7 to 4 billion from the export of travel. This will be achieved through measures, such as: investments in accommodation capacities (*greenfield* and *brownfield*), public tourist infrastructure and interpretation centres, the definition of special areas for tourism development, creating supportive schemes and lines of credit, re-structuring state-owned hotel companies, improving the business environment, improving accessibility by air and rail, raising the quality and innovativeness of products, legislative changes, developing human resources –to emphasise only the most important ones.

The Development Strategy foresees the focus on the development of a competitive, high-quality, and distinctive offer based on sustainable principles with sustainable growth; the marketing strategy in particular takes into account the challenges in the increasingly demanding, saturated, and segmented international market that requires an effective marketing strategy – having focus (markets and target groups), authentic and distinctive communication, excellent content (for

which an excellent experience and attractive products are of key importance), and enhancing digital channels.

KEY GUIDELINES FOR THE WORK OF THE SLOVENIAN TOURIST BOARD ARISING FROM THE STRATEGY

In 2018 and 2019, the activities of the Slovenian Tourist Board will be focused on increasing Slovenia's recognisability as a 'green boutique global destination for high-end visitors seeking diverse and active experiences, peace, and personal benefits' (as the new vision of Slovenian tourism is defined).

The 2018/2019 Work Programme of the Slovenian Tourist Board is based on strategic development and marketing guidelines that are proposed by the new 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism. For the Slovenian Tourist Board, this includes (1) restructuring the marketing management system (establishing a system of macro destinations for an enhanced integration from an umbrella level to a destination level), (2) promoting product development and the competitiveness enhancement (green, innovative products with higher added value), (3) strengthening the I Feel Slovenia brand, and (4) focusing on key markets and enhancing digitalisation.

The important foundation for our work in the coming strategic period is to establish a system of four macro destinations (Alpine Slovenia, Mediterranean Slovenia, Central Slovenia & Ljubljana, Thermal Pannonian Slovenia) with the purpose of (1) communicating and promoting Slovenia more effectively at an umbrella level (the system of macro destinations emphasises the important comparative advantage of Slovenia as a destination where the Alps, the Mediterranean, the Karst, and the Pannonian Plains meet) – which, as we'd like to emphasise, still remains a single destination, and (2) enhancing vertical connections from the umbrella level to the destination level (as well as horizontal connections within a macro destination and between macro destinations), which will serve as the basis for development and educational activities with leading destinations – focused on destination management, the management of the experience in a destination, and the development and promotion of product competitiveness. At the same time, this system is a platform for strengthening tourism development within the scope of the new pillar titled Tourism Development Within the Tourism Directorate (the Ministry of Economic Development and Technology).

The necessary upgrade will also be carried out in the field of enhancing the I Feel Slovenia brand. We are planning a new conceptual communications and creative platform, by means of which the

brand architecture will be regulated from the umbrella level to the macro destination level, especially at a product level, and in order to achieve greater marketing synergies between the umbrella level and the local level, it will also be strengthened at a local level using support tools (it will be more actively used by destinations and providers). On the basis of this, a new concept for a communications solution and creative solutions will be developed; these solutions will become the communications framework for the entire integrated marketing communication (online and offline) at the umbrella level of Slovenian tourism (in the Slovenian Tourist Board) for the next five years.

CULTURE AS A CENTRAL TOPIC FOR 2018 AND 2019

The central promotional topic for the following two years is culture (cultural tourism), which means that, within marketing activities at the level of the Slovenian Tourist Board, this product will be more highlighted. For this purpose, the Slovenian Tourist Board drafted the Operational Marketing Plan for Cultural Tourism in Slovenia, by means of which the following vision will be fulfilled: "To position Slovenia by 2020 as a recognisable cultural destination for guests who come with a primary or secondary motive to enjoy culture."

BUDGET

The amount of resources earmarked for individual markets will be based on the division of markets into three groups: 1) key markets, 2) growing prospective markets, and 3) distant markets. On the basis of the definition of priority markets and central products, a product marketing matrix has also been devised, which determines which products will be marketed as a priority in particular markets or market segments. When selecting promotional channels, the emphasis will be on the further enhancement of digital channels by increasing the amount of resources earmarked for digital marketing. As digital marketing increases, all other promotional channels will remain adequately covered, too.

In 2018, the budget foreseen for the implementation of the Work Plan of the Slovenian Tourist Board amounts to EUR 11,450,000 (of which EUR 650,000 will be the Board's own resources), and EUR 2,360,000 is intended for the operation of the Slovenian Tourist Board, which amounts to a total of EUR 13,810,000. In 2019, the budget foreseen for the implementation of the Work Plan of the Slovenian Tourist Board amounts to EUR 11,450,000 (of which EUR 650,000 will be the Board's own resources), and EUR 2,450,000 is intended for the operation of the Slovenian

Tourist Board, which amounts to a total of EUR 13,900,000. Currently, the activities at the Slovenian Tourist Board are carried out in accordance with the human resource plan by 35 employees, of which three are representatives abroad (in Germany, Italy, and Austria). In addition to these representative offices abroad, there is also an information point in the United Kingdom.

MEASURING EFFECTIVENESS

Measuring the effectiveness of the work of the Slovenian Tourist Board is based on a method used in the Balanced Scorecard system, which defines the measuring the performance and effectiveness of a public agency in four basic fields: (1) financial aspect, (2) the aspect of internal business processes, (3) the aspect of working with customers or partners in Slovenian tourism, and (4) the aspect of employees (learning and growth). The defined indicators are presented within the individual chapters to which they refer.

PEOPLE, COOPERATION, INTEGRATION

Tourism is an industry that, more than any other industry, requires truly strong integration and cooperation – of various sectors, ministries, companies, organisations, and people. The goal is clear – from EUR 3.7 to 4 billion in revenues from the export of travel by 2021. What will this goal require of all of us? To work in a coordinated, focused, committed, and ambitious manner. This applies to each and every one of us.

2. TOURISM IN SLOVENIA IN 2016 AND 2017 (January–June) AND LOOKING FORWARD

A STATISTICAL OVERVIEW OF 2016¹

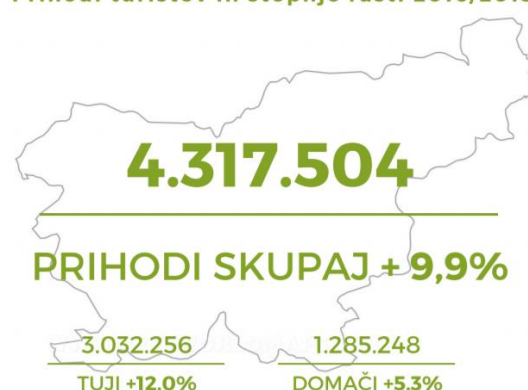
In 2016, Slovenian tourism achieved record-breaking numbers. Its 12% increase in foreign tourist arrivals compared to 2015 rank it above the European average.

In 2016, there were 4,317,504 tourist arrivals and 11,179,879 overnight stays, which is 9.9% more arrivals and 8.1% more overnight stays than in 2015. The number of overnight stays exceeded the threshold of 11 million for the first time.

Prenočitve turistov in stopnje rasti 2016/2015



Prihodi turistov in stopnje rasti 2016/2015

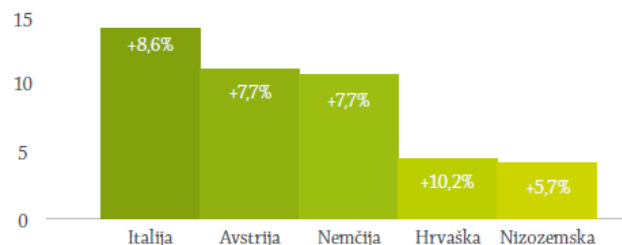


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Prenočitve turistov in stopnje rasti 2016/2015	Tourist overnight stays and growth rates 2016/2015
11.179.879	11,179,879
PRENOČITVE SKUPAJ +8,1 %	TOTAL OVERNIGHT STAYS +8.1%
7.342.118	7,342,118
TUJI + 11,0 %	FOREIGN + 11.0%
3.837.761	3,837,761
DOMAČI + 3,0 %	DOMESTIC + 3.0%
Prihodi turistov in stopnje rasti 2016/2015	Tourist arrivals and growth rates 2016/2015
4.317.504	4,317,504
PRIHODI SKUPAJ + 9,9 %	TOTAL ARRIVALS 9.9 %
3.032.256	3,032,256
TUJI + 12,0 %	FOREIGN + 12.0 %
1.285.248	1,285,248
DOMAČI + 5,3 %	DOMESTIC + 5.3 %

¹ Sources: Statistical Office of the Republic of Slovenia (SURS), UNWTO, ETC, Bank of Slovenia

In 2016, tourist overnight stays consisted of two thirds of overnight stays by foreign visitors. Overnight stays by foreign visitors exceeded the threshold of 7 million for the first time.

Tuji trgi z največjim številom prenočitev in stopnje rasti 2016/2015



In total, foreign tourists generated 65.7% of all overnight stays in 2016. Just over a half of overnight stays by foreign visitors (51.6%) in 2016 was generated by tourists from six countries: Italy (15.6%), Austria (11.4%), Germany (11.2%), Croatia (4.8%), the Netherlands (4.4%), and the United Kingdom (4.3%).

SL	EN
Tuji trgi z največjim številom prenočitev in stopnje rasti 2016/2015	Foreign markets with the largest number of overnight stays and growth rates 2016/2015
Italija	Italy
Avstrija	Austria
Nemčija	Germany
Hrvaška	Croatia
Nizozemska	Netherlands

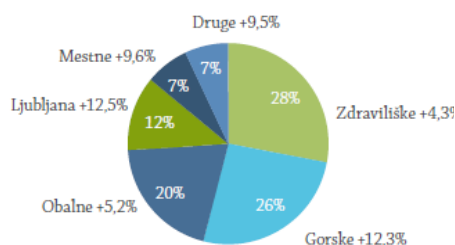
There were 16.5% more tourists from the United Kingdom and 23.1% more tourists from Ireland. The growing trend of overnight stays of tourists from Eastern European countries is also continuing (a 22.4% increase in tourists from Hungary, 17.3% from Czechia, 15.7% from Poland, 25.3% from Slovakia, and 12.9% from Serbia). Interest in Slovenia is also on the rise in the Middle East; in 2016, the increase in overnight stays by guests from Israel amounted to no less than 28.3%. There is also a growing trend in the number of overnight stays by tourists from Nordic countries: There was a 10.5% increase in the number of overnight stays by tourists from Sweden, 12.7% for tourists from Norway, 22.2% for tourists from Denmark, 11.1% for tourists from Finland, 5.7% for tourists from the Netherlands, and 14.5% for tourists from Iceland. A decreasing trend in the number of overnight stays was noticed with regard to tourists from the Russian Federation (-6.5%)

A growing trend in the number of guests from distant markets and their overnight stays has also been noticed. Therefore, in 2016, guests from the Republic of Korea (25.3%), China (19.0%), Australia (11.8%), USA (10.6%), and Canada (11.4%) generated more overnight stays. Negative growth is noticed regarding overnight stays by tourists from Japan (-16.9%) and Brazil (-7.6%).

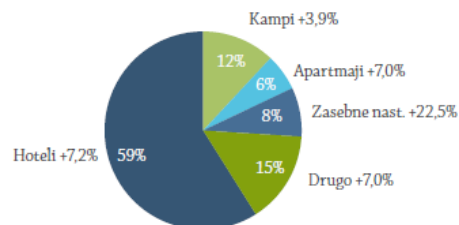
In the said period, there were 5.3 % more domestic guests than in the same period last year, and they generated 3.0 % more overnight stays. Domestic guests account for 30.0% of all arrivals and 34.3% of all overnight stays.

In 2016, the most overnight stays by tourists were in spa municipalities (28.3%), which is 4.3% more than the previous year. Overnight stays in spa municipalities are followed by mountain municipalities with 25.6% of overnight stays and coastal municipalities with 20.3% of overnight stays. Due to an increase in the visits of foreign tourists, there were also more overnight stays in 2016 in Ljubljana, namely by a total of 12.5% more compared to 2015; therefore, Ljubljana experienced the greatest growth rate from among all types of municipalities.

Deleži prenočitev po vrstah občin in stopnje rasti 2016/2015



Deleži prenočitev po vrstah nastanitvenih objektov in stopnje rasti 2016/2015



SL	EN
Deleži prenočitev po vrstah občin in stopnje rasti 2016/2015	Proportions of overnight stays by type of municipality and growth rates 2016/2015
Mestne +9,6%	City +9.6%
Ljubljana +12,5%	Ljubljana +12.5%
Obalne +5,2%	Coastal +5.2%
Gorske +12,3%	Mountain +12.3%
Zdraviliške +4,3%	Spa +4.3%
Deleži prenočitev po vrstah nastanitvenih objektov in stopnje rasti 2016/2015	Proportions of overnight stays by type of accommodation establishment and growth rates 2016/2015
Kampi +3,9%	Campsites +3.9%
Apartmaji +7,0%	Holiday apartments +7.0%
Zasebne nast. +22,5%	Private accom. +22.5%
Drugo +7,0%	Other +7.0%
Hoteli +7,2%	Hotels +7.2%

Slovenian hotels recorded 59.3% of all overnight stays (7.2% more than in the previous year). Campsites recorded 12.4% of all overnight stays (3.9% more compared to 2015). There was also a major increase in the number of overnight stays by tourists in 2016 compared to 2015 in other accommodation facilities (an increase of 34.9%), youth hostels (an increase of 26.4%), at tourist farms providing accommodation (an increase of 10.6%), and in holiday homes and mountain cabins (an increase of 8.0%).

According to UNWTO, the growth in international tourist arrivals in 2016 in Europe amounted to 2.0%, and according to forecasts from the beginning of this year, it will range from 2.0% to 3.0% in 2017. With a 12.0% growth in international tourist arrivals in 2016, Slovenia has an above-average growth in international tourist arrivals compared to Europe and the world.

In 2016, EUR 2.19 billion of tourism receipts were generated from the export of travel, which accounts for a 4.4% growth compared to 2015².

TOURISM IN NUMBERS IN THE YEAR 2017 (1–6)

According to the Statistical Office of the Republic of Slovenia (SURS), the number of overnight stays by tourists was 12.2% higher in the first six months of 2017 than in the same period last year. The total number of tourists in this period increased by 15.1%. The number of foreign tourists increased by 19.3%, and the number of their overnight stays increased by 17.0%. In the said period, there were 6.9% more domestic guests than in the same period last year, and they generated 4.6% more overnight stays. No less than 68.5% of all arrivals and 63.8% of all overnight stays were generated by foreign guests. **Considering the number of overnight stays from January to June, the key markets were: Italy (15.5%), Austria (13.3%), Germany (10.8%), Croatia (7.1%), and Serbia (4.6%).**

In this period, there was an increase in the number of overnight stays from the emitting markets of Austria (an increase of 15.5%), Italy (an increase of 6.5%), and Germany (an increase of 26.0%). The number of tourists from the United Kingdom increased by 12.9%, and the number of guests from Ireland increased by 23.3%. There were also more overnight stays from neighbouring countries, 10.3% more by visitors from Croatia and 12.6% more by visitors from Hungary. The growing trend of overnight stays of tourists from Eastern European countries is also continuing (a 20.5% increase in the number of overnight stays by tourists from Czechia, 41.5% from Poland, 26.4% from Slovakia, and 8.0 % from Serbia). A growing trend of the number of guests from overseas markets and their overnight stays has also been noticed. In the first six months, more overnight stays were therefore generated by guests from China (49.0%), the Republic of Korea (41.0%), Brazil (22.5%), USA (18.1%), and Canada (29.8%), and Australia (21.3%). The information that overnight stays by Russian tourists are once again on the rise is also cause for satisfaction (45.4%).

² In May 2017, the Bank of Slovenia published a revised value of the export of travel for 2015 and 2016. The revision process took into consideration the findings of surveys carried out by the Statistical Office of the Republic of Slovenia (SURS): 1) TU_TURISTI 2015 (a source for the average consumption of tourists with overnight stays), and 2) TU_POTNIKI 2016 (a source for the average consumption of daytrippers and passengers in transit).

In the first six months, the mountain municipalities saw the most tourists (24.7% of arrivals), and tourists most frequently spent the night in spa municipalities (30.3%). The greatest increase in arrivals, compared to the same period in 2016, was generated by tourists in mountain municipalities (19.9%). The number of overnight stays also increased the most in mountain municipalities (18.1%).

FORECASTS FOR 2018 AND 2019

According to UNWTO, tourist arrivals at the global level in 2017 will increase by 3.0% to 4.0%. Greatest increases are expected in regions outside of Europe: in Asia and the Pacific (from +5.0% to +6.0%), in Africa (from +5.0% to +6.0%), in America (from +4.0% to +5.0%), and in the Middle East (from +2.0% to +5.0%). The increase in tourist arrivals in European countries will presumably range from +2.0% to 3.0%, which accounts for 12.4 million more overnight stays than in 2016.

The ETC and UNWTO somewhat differ with regard to the 2016 assessment and the 2017 forecast.

Table 1: Comparison of forecast assessments for 2017 and 2018 by ETC and UNWTO

	2016		2017		2018	
	ETC	UNWTO	ETC	UNWTO	ETC	UNWTO
World	+ 3.6%	+ 3.9%	+ 4.5%	+ 3.0% - + 4.0%	+ 4.6%	N/A
Europe	+ 1.6%	+ 2.0%	+ 4.1%	+ 2.0% - + 3.0%	+ 4.0%	N/A
Asia – Pacific	+ 8.4%	+ 8.4%	+ 5.8%	+ 5.0% - + 6.0%	+ 5.8%	N/A
America	+ 4.3%	+ 4.3%	+ 2.9%	+ 4.0% - + 5.0%	+ 3.7%	N/A
Africa	- 1.3%	+ 8.1%	+ 6.0%	+ 5.0% - + 6.0%	+ 6.0%	N/A
Middle East	+ 3.2%	- 4.1%	+ 5.1%	+ 2.0% - + 5.0%	+ 5.5%	N/A

Source: European Tourism in 2017: Trends & Prospects (Q2/2017); UNWTO Tourist Barometer

3. THE STRATEGIC DEVELOPMENT FRAMEWORK AS LAID DOWN BY THE 2017–2021 STRATEGY FOR THE SUSTAINABLE GROWTH OF SLOVENIAN TOURISM

3.1 Summary of the key strategic definitions of the Strategy

The 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism defined the strategic development framework for the next five-year period; this framework will serve as the groundwork for the strategic marketing guidelines for the work of the Slovenian Tourist Board in 2018 and 2019 and later. The key points and definitions will be summarised below.

WHERE ARE WE = OBSTACLES

The results of Slovenian tourism are good. Slovenia is becoming an attractive and recognisable green destination, in the past two years it received many prestigious awards for the development of sustainable tourism, and the return on investment into promotion is considerable. **However, many obstacles reduce its competitiveness.** Tourist receipts are increasing more slowly than foreign tourist arrivals, and key business indicators are lagging behind the competition (Slovenia has not made any progress on the WEF rankings; 41st spot).

The Strategy defined key challenges, of which those that significantly affect the marketing of Slovenian tourism have been highlighted below.

FIRSTLY: Products with insufficient added value >>> There is a need for considerable investments into new tourist offers (accommodation, interpretation centres, public tourist infrastructure) and innovative/sustainable products, access to local, organic food.

SECONDLY: The existing guest structure and low average consumption >>> There is a need for addressing target groups in higher income brackets (the necessary basis: high-quality infrastructure and products).

THIRDLY: Poorly paid, insufficiently motivated and educated human resources >>> There is a need to invest more in people (salaries, motivation, education), this is especially important within the concept of sustainable tourism.

FOURTHLY: Insufficiently effective destination organisation and management >>> There is a need for enhancing vertical and horizontal connections, a more professional role of local tourist destinations (enhancing the role of DMMO – Destination Management Marketing Organisation).

FIFTHLY: Slovenia does not have simple geographic access >>> There is a need for improving air (new lines) and rail connections; at the level of destinations and the connections between them, sustainable mobility must be promoted.

SIXTHLY: Slovenia does not have simple procedural access >>> There is a need for regulating the visa system.

SEVENTHLY: Tourism is the least competitive in the field of culture (WEF, 2017) >>> More UNESCO cultural landmarks, better cooperation between culture and tourism, greater marketing focus in cultural institutions.

EIGHTHLY: Legislative amendments for more competitive products >>> Training guides, updating the legislation in the field of accommodation, eliminating double licences for water sports guides, etc.

NINTHLY: A systemic source of financing development and promotion >>> Regulating a systemic source of financing the Slovenian Tourist Board.

TENTHLY: Strengthening the strategy of high-value competitiveness >>> If Slovenia wishes to successfully compete with its competition, it must apply the strategy of developing high-value tourism.

WHAT WE WISH TO ACHIEVE = DEVELOPMENT SCENARIO

The Strategy is focused on the scenario of accelerated tourism development, and it defines the measures required to achieve the tourism development goals by 2021, as defined below.

The development goals of Slovenian tourism

-
1. EUR 3.7–4 billion from the export of travel,
 2. 5.0–5.5 million tourist visits,
 3. 16–18 million overnight stays,
 4. average length of stay 3.1–3.4 days,
 5. 18,000–22,000 new tourist rooms, of which 8,500 are renovated in the hotel sector and 6,500 are new,

6. increasing full-time employment in the tourism industry from 8,000 to 12,000 employees.
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WHAT WE WISH TO ACHIEVE = THE VISION OF SLOVENIAN TOURISM

Slovenia is a global green boutique destination
for high-end visitors
seeking diverse and active experiences, peace, and personal benefits.

(English) "Slovenia is a global green boutique destination for high-end visitors, looking for diverse and active experiences, peace, and personal benefits."

The vision consists of the following key elements that serve as the basis for marketing positioning:

... global ...

- A globally recognisable tourist offer and experiences.
- A high value of the marketing brand – national and tourist.

... green boutique destination ...

- Focus on a Slovenian green experience in all phases of a consumer's trip.
- High-quality experiences for visitors.
- The feeling of Slovenia's boutique character while spending holidays here.

... for high-end visitors ...

- Tourists with refined taste – recognise the uniqueness of experiences – green, active, healthy.
- High-end guests who seek diverse and satisfying experiences, different from mass tourism and non-sustainable concepts.

... seeking diverse and active experiences ...

- Diverse experiences: from passive relaxation, laid back exploration, and sightseeing to active holidays, adrenaline-filled challenges, and going beyond one's own comfort zone.

... peace ...

- The feeling of inner peace and a revived holiday satisfaction.
- An emphasis on a peaceful environment – breathtaking views, backdrops, unspoilt nature and cultural beauties, mountain peaks, lakes, rivers, the coast, etc.
- An emphasis on a safe environment.

... **personal benefits.**

- By spending holidays in Slovenia, visitors feel that they experience benefits at a personal level: satisfaction, fulfilment, self-realisation, inspiration, relaxation, wellness, learning, and new realisations.

HOW WE WILL ACHIEVE THIS = BASIC STRATEGIC GUIDELINES AND POLICIES

The Strategy defines the following fundamental strategic guidelines that are then transformed into policies:

1. high-value competitiveness strategy,
2. consistent structuring of experiences and active management and strengthening of the marketing brand,
3. a focused product portfolio, designing and marketing products with higher added value, and adjusting the value chain,
4. focusing on leading destinations and companies that need to be supported, while at the same time actively promoting small and medium-sized enterprises,
5. carrying out important investments into the renovation of old accommodation capacities and investments into new tourist attractions and infrastructure,
6. an updated tourism marketing management system,
7. adjusted tourism legislation,
8. environmental protection and the Slovenian story of activities in nature,
9. care for employees and a system for building human resource capacities,
10. continued strengthening of Slovenia's recognisability by focusing on key markets and the target group defined in the vision.

The entire strategic development concept is made operational through six key development policies (and an additional marketing one), within which the Strategy defines measures and activities.

Chart 1: A presentation of six development policies that serve as groundwork for the marketing strategy (2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism)



SL	EN
TRŽENJSKA STRATEGIJA	MARKETING STRATEGY
MAKRO DESTINACIJE IN TURISTIČNI PRODUKTI	MACRO DESTINATIONS AND TOURIST PRODUCTS
INSTITUCIONALNI IN PRAVNI OKVIR	INSTITUTIONAL AND LEGAL FRAMEWORK
NASTANITVE, TURISTIČNA INFRASTRUKTURA IN NALOŽBE	ACCOMMODATION, TOURIST INFRASTRUCTURE, AND INVESTMENTS
PROSTOR, NARAVNI IN KULTURNI VIRI	SPACE, NATURAL AND CULTURAL RESOURCES
MALA IN SREDNJA PODJETJA	SMALL AND MEDIUM-SIZED ENTERPRISES
KADRI	HUMAN RESOURCES

3.2 Marketing guidelines for the Slovenian Tourist Board, which are based on the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism

The following four key marketing guidelines, which serve as groundwork for the work of the Slovenian Tourist Board in the coming strategic period and which are included by the Slovenian Tourist Board into its Work Programme for 2018 and 2019³, are derived from the strategic guidelines for Slovenian tourism (2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism).

Chart 2: A presentation of key marketing guidelines of the Slovenian Tourist Board for the coming period



SL	EN
MANAGEMENT	MANAGEMENT
PREOBLIKOVANJE SISTEMA TRŽENJSKEGA UPRAVLJANJA SLOVENSKEGA TURIZMA	RESTRUCTURING THE MARKETING MANAGEMENT SYSTEM FOR SLOVENIAN TOURISM
PRODUKTI	PRODUCTS
POSPEŠEVANJE RAZVOJA IN IZBOLJŠANJA KONKURENČNOSTI PRODUKTOV	PROMOTING PRODUCT DEVELOPMENT AND IMPROVING PRODUCT COMPETITIVENESS
ZNAMČENJE	BRANDING

³ The key marketing guidelines are presented in greater detail in Chapter 5 of the Work Programme of the Slovenian Tourist Board for 2018 and 2019.

KREPITEV ZNAMKE I feel Slovenia in »BIG IDEA«	ENHANCEMENT OF THE BRAND I feel Slovenia and the "BIG IDEA"
PROMOCIJA	PROMOTION
OSREDOTOČANJE (trgi, segmenti) & KREPITEV DIGITALIZACIJE	FOCUSING (markets, segments) & ENHANCING DIGITALISATION
TEMELJNI CILJ:	BASIC GOAL:
Povečati dodatno vrednost (produkti z višjo dodatno vrednostjo in višja ADR) in doseganje trajnostne rasti	To increase added value (products with added value and a higher ADR) and achieving sustainable growth
TRŽENJSKI CILJI:	MARKETING GOALS:
1. Povečanje prepoznavnosti in imidža Slovenije, pod znamko I feel Slovenia	1. Increasing Slovenia's recognisability and image under the brand I feel Slovenia.
2. Trajnostna rast, s krepitvijo prihodov tekom celotnega leta	2. Sustainable growth by increasing arrivals throughout the entire year
3. Geografska razpršitev tokov po celotni Sloveniji	3. Geographic dispersion of flows across Slovenia
4. Povečanje potrošnje	4. Increasing consumption
5. Osredotočanje na zahevnega obiskovalca, ki išče kakovostna raznolika in aktivna doživetja, mir in osebe koristi	5. Focusing on high-end visitors seeking high-quality, diverse, and active experiences, peace, and personal benefits

Below is a brief summary of the key strategic definitions, which are then transformed into the Work Programme of the Slovenian Tourist Board for 2018 and 2019 in Chapter 4.

FIRSTLY: Restructuring the Slovenian tourism marketing management system and establishing a macro destination system

= Establishing a marketing system with 4 macro destinations in order to (1) more effectively communicate and promote at the umbrella level of Slovenian tourism, (2) enhance vertical connections from the umbrella level to the destination level, and (3) to provide active development and education work with destinations in order to promote product development and competitiveness.

Clear and easy-to-understand communication of the special features and uniqueness of a country is now one of the basic conditions to be successful in the tourism market. To support this, Slovenia established tourist clusters that make sense from a marketing logic point of view and provide experiences and products; these clusters are also called macro destinations (hereinafter: macro destinations or MDs), which (1) are based on delineated geographic units, (2) share the same or similar offer or products, and (3) are globally recognisable. **Macro destinations become the basis for strengthening the identity of a destination and achieving synergies in the field of product**

development and promotion, while at the same time, at the umbrella level, they contribute to a clearer and more focused marketing communication and Slovenia's positioning in foreign markets.

The macro destination model utilises Slovenia's significant comparative advantage as the only country in Europe, where (at an easily manageable distance) the Alps, the Mediterranean (including the Karst region), and the Pannonian Plains meet – these are three globally recognisable and distinctive tourist regions of Europe, which are perceived by target visitors through clear ideas on the type of offer and products. The condition for a successful macro destination policy is to establish a bottom-up system, where the critical mass of stakeholders and destinations recognises the importance and opportunities of cooperation in the field of product development and promotion. Therefore, the macro destination model is not based on administrative limits and organisations, but is defined so as to, on the one hand, enable foreign tourists to have a simple understanding of the geography and the products, and on the other hand, to maximise the marketing effects for all stakeholders involved (strengthening integration among destinations with regard to products and promotion).

We would like to emphasise that Slovenia has been and remains a single destination, but macro destinations will mainly facilitate clearer communication; at the same time, the system is becoming a platform for enhancing vertical connections from the umbrella level to the destination level (Slovenian Tourist Board) and for strengthening development work.

Chart 3: A marketing-based division of Slovenia into 4 macro destinations



SL	EN
1. Mediteranska Slovenija	1. Mediterranean Slovenia
2. Alpska Slovenija	February Alpine Slovenia
3. Termalna Panonska Slovenija	3. Thermal Pannonian Slovenia
4. Osrednja Slovenija & Ljubljana	4. Central Slovenia & Ljubljana
ALPSKA SLOVENIJA	ALPINE SLOVENIA

MEDITERANSKA SLOVENIJA	MEDITERRANEAN SLOVENIA
OSREDNJA SLOVENIJA & LJUBLJANA	CENTRAL SLOVENIA & LJUBLJANA
TERMALNA PANONSKA SLOVENIJA	THERMAL PANNONIAN SLOVENIA

The names of macro destinations contain the names of globally recognisable geographic units (the Alps, the Mediterranean, Pannonian Plains – this unit also includes the product-related name “thermal,” as this enables a greater level of product identification by the providers of the central product in this area). They are given a suitable marketing-related name within the phase of regulating the architectural system for the I feel Slovenia brand.

For each macro destination, the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism defined the following strategic elements that serve as the basis for marketing and development:

- 1. Central products:** these are products that are of central significance with regard to the current scope of accommodation/consumption and with regard to the impact on the image/recognisability of a macro destination; furthermore it is important with regard to the future growth potential depending on the attractiveness of this market and the competitiveness of the Slovenian product in this market.
- 2. Supporting/secondary products:** these are products that are of lesser significance or scope and that have a lesser impact on the image; they are significant as products supporting the central products.
- 3. Leading destinations⁴:** are destinations that are in a leading position considering the number of overnight stays at an individual macro destination and considering their impact on image creation or the recognisability of a macro destination and consequently of Slovenia – usually, there are six to nine leading destinations per macro destination. Leading destinations are also entry points to the wider destination and are important for also presenting other destination (when they are presented in the national “pull” promotion).

More detailed criteria for including a destination among the leading destinations of a particular macro destination:

- a competent development and marketing partner (DMMO– Destination Management Marketing Organisation),

⁴ The definition of leading and other destinations was devised on the basis of data on overnight stays for 2016 and by taking into consideration all of the defined criteria; however, in the years to come, changes will also be possible when establishing this model in practice: 1) if a destination begins to meet criteria (strengthened position, new visible investments, innovative projects, active strategically managed development, increased number of overnight stays/visits, etc.), or 2) if it does not meet criteria (management changes, lack of responsiveness by a partner when carrying out activities, etc.).

- the number of overnight stays (by foreign visitors; if necessary, this number will be corrected by means of the weight α 'the destination's impact on the image or recognisability of a macro destination and of Slovenia'),
- the destination's growth potential (overnight stays, visits, green and innovative products, beds, etc.),
- visit (one-day visitors),
- USP (unique selling proposition) for a macro destination and for Slovenia,
- development work on products,
- the financial and content-related participation of a partner in programmes,
- including other destinations, and
- a transparent marketing management model (programme and financial resources).

4. Other destinations: these are destinations that generate a particular number of overnight stays, but below the threshold of leading destinations (and they have a lesser influence on the image of macro destinations), and they are mostly connected to one product. For the most part, they are included in the broader destination, and their specific products/experiences connect them to the leading destinations. At the same time, they are included in promotional and development channels through products.

5. Experiences: in this phase, 5 TOP experiences have been defined, which have the greatest influence on the distinctive character and image of a macro destination (they also serve as the basis for 5 of the most recognisable motifs of a macro destination).

Furthermore, additional destinations are also included into promotional and communications channels at a national level (including those that have not been defined as leading destinations or other destinations), which have specific experiences; they are included on the basis of the criterion that an experience/product has a manager, organiser, that it achieves a suitable quality level, and that it is presented in foreign languages. **A special place is held by innovative, green products and EDEN experiences, UNESCO and SLOVENIA GREEN destinations, and in 2018/2019, when CULTURE will be the umbrella (overarching) topic,** there will also be greater emphasis on cultural experiences (guided tours, creative industries, workshops, festivals, museums, galleries, cultural landscape, etc.). This is a level of communication that is the most dynamic and open, so it is not defined within the Strategy through specific content.

On the pages below, we would like to present the basic strategic definitions for individual macro destinations, as defined by the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism.

MACRO DESTINATION 1: Alpine Slovenia

	LEADING DESTINATIONS	No. of municipalities	Overnight stays 2015	Overnight stays 2016	Percent age of overnight stays by foreign tourists (2016)	Tourist overnight stays index 16/15	Proportion of leading destinations in MDs
1	Bled	1	730,074	807,135	94.20	110.56	24.36
2	Kranjska Gora	1	520,265	565,590	65.22	108.71	17.07
3	Soča Valley (Bovec, Tolmin, Kobarid)	2	378,274	442,317	76.96	116.93	13.35
4	Lake Bohinj	1	370,771	420,115	69.37	113.31	12.68
5	Radovljica	1	139,871	161,246	92.96	115.28	4.87
6	Kranj	1	73,041	90,724	88.93	124.21	2.74
7	Maribor (Maribor – the Pohorje Hills)	22	379,399	415,399	72.78	109.49	12.59
8	Zreče (Rogla – the Pohorje Hills)	4	215,980	229,971	35.15	106.48	6.94
9	Logar Valley – Upper Savinja Valley	8	52,691	62,102	72.30	117.86	1.87
10	Koroška region	12	112,647	116,816	39.14	103.70	3.53
	TOTAL		2,973,013	3,313,087		111.44	100.00



The character of Alpine Slovenia:

A picturesque year-round active Alpine atmosphere.

Alpine peaks, exceptional views, rivers, lakes, and valleys, hiking and cycling trails, ski resorts, and infrastructure that serves as the basis for a year-round active holiday and outdoor experiences in nature.

PRODUCTS

Central products

- HOLIDAYS IN THE MOUNTAINS** (year-round active holidays in the mountains for couples and families: experiences in nature, activities, wellness, relaxation)
- SPORTS TOURISM** (a year-round product for sports teams' preparations, sporting events, and sports championships at a European and global level)
- OUTDOOR** (year-round active sports in nature, such as cycling, hiking, water sports, skiing, etc. – the central motivation for arrivals) – emphasis is on a particular outdoor activity as the leading motivation for arrivals)
- BUSINESS MEETINGS & EVENTS** (year-round business tourism – business guests at conferences, meetings, motivational meetings and

Secondary/supportive

- **GASTRONOMY**
- **EXPERIENCING NATURE**
- **CULTURE**
- **COUNTRYSIDE TOURISM**
- **TOURING**
- **CASINO GAMBLING**

exhibitions, together with events attracting guests that stay for multiple days)	
DESTINATIONS	
Leading destinations	Other destinations
<ol style="list-style-type: none"> 1. Bled (Julian Alps) 2. Kranjska Gora (Julian Alps) 3. Soča Valley⁵ (Julian Alps) 4. Bohinj (Julian Alps) 5. Radovljica (Julian Alps) 6. Kranj 7. Maribor – Pohorje (the Pohorje Hills)⁶ 8. Rogla Ski Resort – Pohorje Hills (the Pohorje Hills) 9. The Upper Savinja Valley⁷ (the Kamnik and Savinja Alps) 10. Koroška region 	<ul style="list-style-type: none"> • Pokljuka/Gorje (Julian Alps) • Cerkno • Jezersko (Kamnik and Savinja Alps)
TOP 5 experiences	
<ol style="list-style-type: none"> 1. Bled including Lake Bled, an island with a church, and a medieval castle on a cliff. 2. Bohinj – more than half of this area is in the Triglav National Park – it is an ideal place for those seeking peace in nature. 3. Triglav National Park: park trails, guided trips, workshops, and accommodation establishments embraced by unspoilt nature. 4. Water activities on the emerald River Soča. 5. Logar Valley, one of the most beautiful glacial Alpine valleys with the Rinka Waterfall. 	
GEOGRAPHIC AREAS WITH A BRAND AND MARKETING-BASED INTEGRATION	
<p><i>The following regions have been established in the area of the macro destination: Slovenian Alps/Gorenjska region, Goriška region/Emerald Trail, the Koroška region, the Savinja-Šalek region, and Alpine Slovenia also partially covers the area of the Central Štajerska/Upper Podravje region Regional Destination Tourism Board (hereinafter: RDTB) – namely the sub-destinations of Maribor and the Pohorje Hills.</i></p> <p>The following regional connections remain within the new model: (1) a part of the SAŠA region (excluding the municipalities of Velenje and Šoštanj, which belong to Thermal Pannonian Slovenia), which is integrated as the Upper Savinja Valley, and (2) the Koroška region.</p> <p>Today, marketing-based (mostly informal) integrations among destinations are carried out as follows:</p> <ul style="list-style-type: none"> • The Julian Alps (the biosphere area of the Julian Alps, UNESCO MAB): Bled, Bohinj, Bovec, Gorje, Jesenice, Kobarid, Kranjska Gora, Radovljica, Tolmin, and Žirovnica (the Triglav National Park is also an active partner in the integration process). • The Kamnik and Savinja Alps: Cerklje na Gorenjskem, Kamnik, Solčava, Luče, Jezersko, and Preddvor. 	

⁵ The destination Soča Valley consists of the following destinations: Bovec, Kobarid, and Tolmin, which have a common DMMO (Soča Valley Tourism – Turizem Doline Soče).

⁶ The destination Maribor – Pohorje Hills covers the entire area of the Central Štajerska region (Cerkvenjak, Duplek, Hoče-Slivnica, Kungota, Lenart, Lovrenc na Pohorju, Makole, Maribor, Miklavž na Dravskem polju, Oplotnica, Pesnica, Poljčane, Rače-Fram, Ruše, Selnica ob Dravi, Slovenska Bistrica, Starše, Sveta Ana, Sveti Jurij v Slovenskih goricah, Sveta Trojica v Slovenskih goricah, Šentilj).

⁷ Within the Upper Savinja Valley, the Logar Valley is emphasised; the entire destination, however, covers the municipalities of Mozirje, Nazarje, Rečica ob Savinji, Gornji Grad, Ljubno, Luče, Solčava, and Šmartno ob Paki. Solčava and Luče are also connected within the destination Kamnik and Savinja Alps.

- **The Pohorje Hills:** consisting of **the Zreče Pohorje Hills** (the area of the municipalities of Oplotnica, Slovenske Konjice, Vitanje, Zreče) and **the Maribor Pohorje Hills** (the area of the municipalities of Maribor, Rače – Fram, Hoče – Slivnica, Starše, Benedikt, Cerkvenjak, Duplek, Kungota, Lenart, Lovrenc na Pohorju, Makole, Miklavž na Dravskem Polju, Pesnica, Poljčane, Ruše, Selnica ob Dravi, Slovenska Bistrica, Starše, Sveta Ana, Sveti Jurij v Slovenskih goricah, Sveta Trojica v Slovenskih goricah, and Šentilj). The delineations are not defined in great detail; in fact, integrations in the field have not yet been carried out; furthermore, the identity of the Pohorje Hills is also held by some municipalities in the Koroška region – Mislinja Valley (Ribnica na Pohorju, Mislinja, Slovenj Gradec). The area sees potential in the common Pohorje Hills brand.
- **The Koroška region:** covers all of the municipalities in the region (Črna na Koroškem, Dravograd, Mežica, Mislinja, Muta, Podvelka, Prevalje, Radlje ob Dravi, Ravne na Koroškem, Ribnica na Pohorju, Slovenj Gradec, and Vuzenica), but with regard to products, it is divided according to sense, namely into **Mežica Valley (Karavanke Geopark)**, **Mislinja Valley (Western Pohorje Hills)**, and **the Drava Valley (the Drava Cycling Trail)**.

MACRO DESTINATION 2: Mediterranean Slovenia

LEADING DESTINATIONS	No. of municipalities	Overnight stays 2015	Overnight stays 2016	Percentage of overnight stays by foreign tourists (2016)	Tourist overnight stays index 16/15	Proportion of leading destinations in MDs
1 Portorož and Piran	1	1,408,790	1,507,890	66.20	107.03	55.21
2 Izola	1	347,897	359,430	38.80	103.32	13.16
3 Koper	1	141,088	152,318	60.76	107.96	5.58
4 Ankaran	1	265,328	256,400	35.91	96.64	9.39
5 Postojna Cave/Postojna (the Karst region)	6	85,916	100,628	85.23	117.12	3.68
6 Lipica and Škocjan Caves (the Karst region)	4	105,404	108,682	88.09	103.11	3.98
7 Nova Gorica	1	162,366	171,288	93.55	105.49	6.27
8 Vipava Valley (excluding Nova Gorica)	5	34,847	40,326	80.95	115.72	1.48
9 Brda Hills	1	34,717	34,419	69.84	99.14	1.26
TOTAL		2,586,353	2,731,381		105.61	100.00



The character of Mediterranean Slovenia:

Mediterranean diversity, the natural wonders of the karst landscape.

Enticing and easily accessible small Mediterranean towns, closely connected with the green Istrian countryside, subterranean wonders on a global scale, complemented by gastronomy and world-class wines.

Central products	Secondary/supportive
<ol style="list-style-type: none"> BUSINESS MEETINGS & EVENTS (year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, and events attracting guests that stay for multiple days) SUN AND BEACH (the traditional seasonal Mediterranean product <i>Sun & Beach</i>, based on beaches, the sun, swimming, relaxing, and fun) HEALTH & WELLNESS (a year-round product that focuses on wellness, relaxation, selfness/mindfulness, and prevention, by using natural factors and the Mediterranean climate, speleotherapy, etc.) GASTRONOMY (a combination of culinary heritage and modern solutions that reflect the many characteristics of what is known as the Mediterranean diet, intertwined with Alpine and international cuisine, paired with world-class wines and wine production) 	<ul style="list-style-type: none"> OUTDOOR EXPERIENCING NATURE COUNTRYSIDE TOURISM CULTURE TOURING SPECIAL INTERESTS CRUISING & YACHTING CASINO GAMBLING
DESTINATIONS	
Leading destinations	Other destinations
<ol style="list-style-type: none"> Portorož/Piran (Slovenian Istria) Izola (Slovenian Istria) Koper (Slovenian Istria) Ankaran (Slovenian Istria) Postojna Cave/Postojna (the Karst region) Škocjan Caves and Lipica (the Karst region) Nova Gorica and the Vipava Valley Brda Hills 	<ul style="list-style-type: none"> Štanjel (the Karst region) Cerknica (the Karst region) Ajdovščina (Vipava Valley) Vipava (Vipava Valley) <p><i>All of the listed destinations are already included through the leading destinations.</i></p>
TOP 5 experiences	
<ol style="list-style-type: none"> Attractive coastal towns of Slovenian Istria: the historic towns of Piran and Koper, the Portorož Riviera, and the fishing town of Izola, including the attractive green Istrian countryside. The wonders of the subterranean karst world: Postojna Cave, Škocjan Caves (UNESCO), and others. Lipica, one of the oldest stud farms in the world, the original stud farm for rearing Lipizzaner horses. The Sečovelje Salt Pans, a unique salt-making landscape, which is among the most beautiful and oldest still-operating salt pans in the world (where the traditional production of salt still takes place). The picturesque town of Štanjel in the Karst region. 	
GEOGRAPHIC AREAS WITH A BRAND AND MARKETING-BASED INTEGRATION	
<p><i>The following regions have been established in the area of the macro destination: The Notranjska-Karst region/the Green Karst, the coastal and Karst region (Obalno-kraška) (the beginnings of integration, but an RDTB has not been established), while the destinations of the Vipava Valley and the Brda Hills were a part of the Goriška region.</i></p> <p>Today's marketing-based integrations of destinations take place in the following manners:</p> <ul style="list-style-type: none"> Slovenian Istria: Ankaran, Izola, Piran, Koper. Karst: The Karst: Divača, Hrpelje – Kozina, Komen, Sežana, and the Green Karst: Bloke, Cerknica, Ilirska Bistrica, Loška Dolina, Pivka, Postojna – this region is treated as a single area and, when communicating, 	

it is not divided into two parts; however, the promotion/marketing activities take place by emphasising three defined icons, to which the rest of the offer refers.

- **Nova Gorica and the Vipava Valley** (Ajdovščina, Vipava, Nova Gorica, Renče – Vogrsko, Miren – Kostanjevica, Šempeter – Vrtojba).
- **The Brda Hills** (whereby Nova Gorica, the Vipava Valley, and the Brda Hills are integrated as it pertains to products and promotion).

MACRO DESTINATION 3: Thermal Pannonian Slovenia

LEADING DESTINATIONS		No. of municipalities	Overnight stays 2015	Overnight stays 2016	Percentage of overnight stays by foreign tourists (2016)	Tourist overnight stays index 16/15	Share of leading destinations in MDs
1	Moravske Toplice, Radenci, Lendava (the Pomurje region)	26	920,805	966,884	42.04	105.00	30.25
2	Ptuj	1	145,700	142,887	47.80	98.07	4.47
3	Topolšica/Šoštanj and Velenje (Šalek Valley)	2	125,235	130,500	34.80	104.20	4.08
4	Laško	1	235,969	257,718	47.92	109.22	8.06
5	Celje	1	51,847	51,649	73.13	99.62	1.62
6	Podčetrtek	1	317,995	337,499	39.11	106.13	10.56
7	Rogaška Slatina	1	223,584	227,408	81.13	101.71	7.12
8	Dobrna	1	106,516	119,375	24.93	112.07	3.74
9	Čatež (the Posavje region)	6	649,329	661,070	52.27	101.81	20.69
10	Novo Mesto, Šmarješke Toplice and Dolenjske Toplice (the Dolenjska region)	12	278,150	300,830	40.66	108.15	9.41
Dolenjske Toplice			108,347	120,585	29.30		
Šmarješke Toplice			92,331	97,044	29.56		
Novo Mesto			60,441	63,031	77.45		
TOTAL			3,055,130	3,195,820		104.61	100.00



The character of Thermal Pannonian Slovenia

Relaxation, health, and re-energising.

A romantic mosaic of plains, gentle hills, vineyards, and castles, filled with hot springs, is an excellent choice for all those seeking health, relaxation, active holidays, and great cuisine.

PRODUCTS

Central products

- HEALTH AND WELLNESS** (a year-round product focusing on health, prevention, wellness, relaxation, and thermal water experiences for visitors of all ages)
- GASTRONOMY** (excellent gastronomy based on local production and recipes, and it is supported by high-quality wine and beer)
- COUNTRYSIDE TOURISM** (year-round tourism that is based on the offer of tourist farms, small providers, and *zidanica*)

Secondary/supportive products

- OUTDOOR**
- CULTURE**
- SPECIAL INTERESTS** (*zidanica* vineyard cottages, archaeological tourism, pilgrimage tourism, etc.)

vineyard cottages, and on authentic experiences in the countryside)	
DESTINATIONS	
Leading destinations (2016: 2,732,284 overnight stays)	Other destinations
<ol style="list-style-type: none"> 1. Moravske Toplice, Radenci, Lendava (the Pomurje region) 2. Ptuj 3. Šoštanj/Topolšica and Velenje (Šalek Valley) 4. Laško 5. Celje 6. Podčetrtek 7. The Rogaška Slatina Spa 8. Dobrna 9. Čatež (the Posavje Region)⁸ 10. Novo mesto, Šmarješke Toplice and Dolenjske Toplice (the Dolenjska Region) <p><i>Note: The destination Rogla–Pohorje Hills is included in Alpine Slovenia, but Zreče is also included in Thermal Pannonian Slovenia as it is a thermal spa destination. The destination Novo Mesto is also included in the activities of the Central Slovenia & Ljubljana macro destination. Maribor is also appropriately included in the macro destination Thermal Pannonian Slovenia.</i></p>	<ul style="list-style-type: none"> • Murska Sobota (the Pomurje region) • Jeruzalem (the Pomurje region) • Goričko Landscape Park (the Pomurje region) • Žalec • Krško (the Posavje region) • Sevnica (the Posavje region) • Haloze Hills⁹, the Slovenske Gorice Hills, and the Jeruzalem-Ormož Hills
TOP 5 experiences	
<ol style="list-style-type: none"> 1. Health, prevention, wellness, and a thermal getaway in Slovenia's natural spas and thermal centres. 2. World-renowned medicinal mineral drinking water (Radenska and Donat Mg) and renowned natural therapeutic factors with proven effects: thermal and mineral water, mineral peloids, peat, etc. 3. Discovering rich heritage with castles, manors, charterhouses, and historical towns and cities. 4. Authentic gastronomy, offered by hosts at tourist farms and at family restaurants. 5. Active thermal and green getaway: staying at spas, at tourist farms, glamping, and other smaller boutique accommodation establishments, wellness, actively discovering nature (e.g. Krka Valley, Goričko Hills, etc.) and culture, hiking, golfing, and other activities. 	
GEOGRAPHIC AREAS WITH A BRAND AND MARKETING-BASED INTEGRATION	
<p>The following tourist regions (RDTBs) have been established in the area of the macro destination:</p> <ul style="list-style-type: none"> • The Pomurje region: Apače, Beltinci, Cankova, Črenšovci, Dobrovnik, Gornja Radgona, Gornji Petrovci, Grad, Hodoš, Kobilje, Križevci, Kuzma, Lendava, Ljutomer, Moravske Toplice, Murska Sobota, Odranci, Puconci, Radenci, Razkrižje, Rogašovci, Sveti Jurij ob Ščavnici, Šalovci, Tišina, Turnišče, Velika Polana, Veržej. • The Lower Podravje region: Ptuj, Hajdina, Markovci, Gorišnica, Dornava, Kidričevo, Destrnik, Trnovska vas, Sv. Andraž v Slovenskih Goricah, Juršinci, Videm, Zavrč, Podlehnik, Žetale, Majšperk, Cirkulane, 	

⁸ The destination is treated as the Posavje region, whereby, due to its recognisability, the Čatež brand is emphasised (the municipalities of Krško, Brežice, Sevnica, Radeče, Kostanjevica na Krki, and Bistrica ob Sotli).

⁹ The Haloze Hills cover the area of the municipalities of Cirkulane, Majšperk, Makole, Podlehnik, Videm pri Ptuj, Zavrč, and Žetale. The Slovenske Gorice Hills and the Jeruzalem and Ormož Hills (Jeruzalemsko-Ormoške Gorice) are integrated with Ptuj, thus forming a coherent destination for arrivals.

Ormož, Središče ob Dravi, and Sveti Tomaž. These are three geographic areas: The Ptuj Field (the Ptuj brand), Haloze Hills (the Haloze brand), and the Slovenske Gorice Hills.

- **The Central Štajerska region:** Cerkevjak, Duplek, Hoče-Slivnica, Kungota, Lenart, Lovrenc na Pohorju, Makole, Maribor, Miklavž na Dravskem polju, Oplotnica, Pesnica, Poljčane, Rače-Fram, Ruše, Selnica ob Dravi, Sl. Bistrica, Starše, Sveta Ana, Sveti Jurij v Slovenskih Goricah, Sveta Trojica v Slovenskih Goricah, Šentilj.
- **The Savinja region/Land of Celje:** The region consists of four sub-regions: Celje region (Celje, Dobrna, Laško, Štore, Vojnik); the Lower Savinja Valley (Braslovče, Polzela, Prebold, Tabor, Vransko, Žalec); the Dravinja Valley (Slovenske Konjice, Vitanje, Zreče); the Obsotelje and Kozjansko regions (Dobje, Kozje, Podčetrtek, Rogaška Slatina, Rogatec, Šentjur pri Celju, Šmarje pri Jelšah).
- **The Posavje region** (Posavje RDTB): Krško, Brežice, Sevnica, Radeče, Kostanjevica na Krki, and Bistrica ob Sotli.
- **Southeastern Slovenia** (Southeastern Slovenia RDTB): The region consists of three geographically connected units: The Dolenjska region (Novo Mesto, Šentjernej, Šmarješke Toplice, Dolenjske Toplice, Škocjan, Straža, Mirna Peč, Miren, Trebnje, Šentrupert, Mokronog, Žužemberk), the Kočevsko-Ribniško region (Kočevje, Ribnica, Sodražica, Loški Potok, Kostel, Osilnica), and Bela Krajina (Semič, Črnomelj, Metlika) – the last two units are now in the macro destination Central Slovenia & Ljubljana, but the Dolenjska region remains in the Thermal Pannonian Slovenia.

Because some of these integrations are terminated due to the new macro region concept (some of them are even classified in the Central Slovenia & Ljubljana macro region – e.g. Bela Krajina and the Kočevsko-Ribniško region), the model for integration in the field within the macro destination Thermal Pannonian Slovenia will be subject to implementation work and integration in the field (depending on the willingness of partners and on whether it makes sense from a marketing perspective).

MACRO DESTINATION 4: Central Slovenia & Ljubljana

	LEADING DESTINATIONS	No. of municipalities	Overnight stays 2015	Overnight stays 2016	Percentage of overnight stays by foreign tourists (2016)	Tourist overnight stays index 16/15	PROPORTION OF LEADING DESTINATIONS in MDs
1	Ljubljana (the Central Slovenia region) ¹⁰	26	1,277,106	1,437,348	97.48	112.55	84.98
2	Kamnik	1	55,790	65,488	66.30	117.38	3.87
3	Cerklje na Gorenjskem	1	53,174	61,099	85.04	114.90	3.61
4	The Bela Krajina region	3	60,305	56,823	28.49	94.23	3.36
5	The Kočevsko region	3	29,653	29,995	52.56	101.15	1.77
6	Škofja Loka (Poljane Valley and Selca Valley)	4	21,211	23,939	76.68	112.86	1.24
	Idrija	1	14,525	16,737	41.26	115.23	0.99
	TOTAL		1,476,028	1,650,753		111.88	100.00



The character of Central Slovenia and Ljubljana:

A vibrant capital city with unspoilt and easily accessible nature on its doorstep – where culture and nature meet.

Culture and art, thousands of world-class and street performances and events, shopping, and a dynamic urban culinary scene – only a few steps away, you can find nature with a rich offer of activities and authentic experiences in the countryside.

PRODUCTS	
Central products	Secondary/supporting
1. MICE & EVENTS (year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, together with supporting events attracting guests that stay for multiple days)	• OUTDOOR
2. TOWNS, CITIES, AND CULTURE (city break, rich history, festivals and events, modern and alternative art, exploring towns and cities)	• SHOPPING
3. TOURING (Ljubljana as a city for exploring the macro destination and Slovenia)	• SPECIAL INTERESTS (bear watching, photo-hunting, etc.)
4. GASTRONOMY (a mix of urban cuisine and cuisine in the countryside)	• CASINO GAMBLING
DESTINATIONS	
Leading destinations	Other destinations

¹⁰ These are the statistics for the Central Slovenian region, with the exclusion of the statistics for Kamnik, which are treated separately.

<ol style="list-style-type: none"> 1. Ljubljana (the Central Slovenia region¹¹) 2. Kamnik¹² (the Central Slovenia region) 3. Cerklje na Gorenjskem¹³ 4. The Bela Krajina Region¹⁴ 5. The Kočevsko region¹⁵, UNESCO 6. Škofja Loka¹⁶ and Idrija, UNESCO (as two UNESCO towns) <p><i>Note: The destination Novo Mesto, which is also a part of the MD Thermal Pannonian Slovenia, is also included in the activities of the Central Slovenia & Ljubljana macro destination.</i></p>	<ul style="list-style-type: none"> • Domžale (the Central Slovenia region) • Vrhnika (the Central Slovenia region) • The Heart of Slovenia¹⁷ • The Zasavje region
TOP 5 experiences	
<ol style="list-style-type: none"> 1. Ljubljana, the European Green Capital 2016 and the cultural capital of Slovenia: Plečnik's Ljubljana, green Ljubljana, active Ljubljana, cultural Ljubljana, athletic Ljubljana, more than 10,000 events per year. 2. The historical Kamnik town centre and the herdsmen's heritage of the Velika Planina plateau, connected by the love story of Trnič cheese. 3. Idrija and Škofja Loka, two historical towns, UNESCO. 4. The Kočevsko region, the most naturally preserved part of Slovenia; mysteries of unspoilt nature and rich cultural heritage. 5. The Ljubljana Marshes Landscape Park, a natural area with swamps and peat bogs, known for rare animal and plant species and for the remains of the prehistoric pile-dweller culture (UNESCO). 	
GEOGRAPHIC AREAS WITH A BRAND AND MARKETING-BASED INTEGRATION	
<p>In the area of macro destinations, the following tourist regions (RDTB's) have been established: the Central Slovenian region and the Zasavje region, while Bela Krajina and the Kočevsko region were a part of Southeastern Slovenia. Among these, Central Slovenia is an active region, Zasavje is active to a limited extent, and the Kočevsko region and Bela Krajina have become stronger as coherent destinations for arrivals.</p> <p>Defined leading destinations are highlighted within the macro destination Central Slovenia & Ljubljana, and from the marketing perspective, the current concept of the Central Slovenia region (Ljubljana and the green embrace of 25 municipalities) is expanding and being upgraded with other areas (the concept of green nature at the doorstep of the capital city).</p>	

¹¹ In addition to Ljubljana, this region also includes another 25 municipalities: Borovnica, Brezovica, Dobrepolje, Dobrova - Polhov Gradec, Dol pri Ljubljani, Domžale, Grosuplje, Horjul, Ig, Ivančna Gorica, Kamnik, Komenda, Litija, Ljubljana, Logatec, Log-Dragomer, Lukovica, Medvode, Mengeš, Moravče, Škofljica, Šmartno pri Litiji, Trzin, Velike Lašče, Vodice, Vrhnika. This is a work concept as defined within the RDTB project.

¹² Kamnik is also integrated in the Kamnik and Savinja Alps (Alpine Slovenia).

¹³ Cerklje na Gorenjskem is also integrated in the Kamnik and Savinja Alps (Alpine Slovenia).

¹⁴ The Bela Krajina region covers the area of the Črnomelj, Metlika, and Semič municipalities.

¹⁵ The Kočevsko region cover the area of the Kočevje, Kostel, and Osilnica municipalities.

¹⁶ In the market, Škofja Loka is present as a coherent area of four municipalities: Škofja Loka, Gorenja Vas – Poljane, Železniki and Žiri (the town of Škofja Loka and the Poljane and Selca Valleys).

¹⁷ The Heart of Slovenia covers the area of the municipalities of Dol pri Ljubljani, Kamnik, Litija, Lukovica, Moravče, and Šmartno pri Litiji.

The model of establishing macro destinations and the method of work involving leading destinations is presented under section 4.6 (Marketing management system).

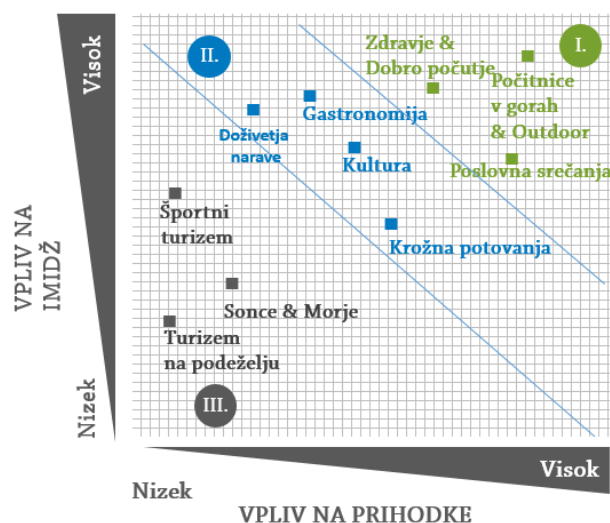
SECONDLY: Promoting product development and improving product competitiveness

= the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology, 2017) is distinctly product-oriented. Within the Tourism Directorate (Ministry of Economic Development and Technology), the Tourism Development¹⁸ function or pillar is added (a strategic development and infrastructure support of product development and investments), and within the Slovenian Tourist Board, the function of promoting product development and competitiveness (green and innovative, higher added value) is strengthening; the development of the Green Scheme of Slovenian Tourism is continuing and product promotional support is being carried out.

At a national level, the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology, 2017) has identified 10 central tourist products that are defined as leading products in individual macro destinations **and are classified into three priority groups, as indicated in the chart below**. As defined in the Strategy, Slovenia must improve the competitiveness of the identified central products and promote the development of new ones in order to achieve the defined strategic goals; to do this, it must establish an active and professional development process, which must be supported by centrally controlled management supported by financial investments, when necessary (public product-related tourist infrastructure), whereby effects for SMEs and other private stakeholders in destinations are ensured.

Chart 4: Key tourist products according to their income and reputation

¹⁸ Product development: Improving tourism competitiveness, planning the development of 4 macro destinations, planning the development in key development areas, the development of key attractions, the preparation of infrastructure projects, support for the economy, improving quality, a clear definition of the required investments and priorities at a national level.



I: Najpomembnejši produkti s perspektive v prihodke in na imidž. *Promocijska podpora, produktni razvoj in upravljanje na nacionalni ravni.*

- POČITNICE V GORAH & OUTDOOR
- ZDRAVJE & DOBRO POČUTJE
- POSLOVNA SREČANJA & DOGODKI

II: Produkti z močnim vplivom na prihodke in imidž.

- DOŽIVETJA NARAVE
- GASTRONOMIJA
- KULTURA
- KROŽNA POTOVANJA

III: Produkti z manjšim do srednjim vplivom na prihodke in imidž.

- ŠPORTNI TURIZEM
- SONCE & MORJE
- TURIZEM NA PODEŽELJU

10 primary tourist products: (1) Holidays in the mountains and Outdoors, (2) Business meetings & events, (3) Health & Wellness, (4) Experiencing Nature, (5) Gastronomy, (6) Culture, (7) Sun and Beach, (8) Sports Tourism, (9) Touring, and (10) Countryside Tourism.

The umbrella (overarching) concept in the field of products is sustainable development, which is a basis development paradigm for all products – the development basis for all sustainable activities is the Green Scheme of Slovenian Tourism. The Green Scheme is a system that combines all sustainable development efforts under the umbrella brand Slovenia Green, it enables comparisons with other green destinations around the world, and also adds national character, which makes it possible to more easily position green Slovenia on the global map.

Chart 5: Overview of central tourist products by macro destination

SL	EN
VPLIV NA IMIDŽ	INFLUENCE ON IMAGE
Visok	High
Nizek	Low
VPLIV NA PRIHODKE	INFLUENCE ON INCOME
Nizek	Low
Visok	High
Turizem na podeželju	Countryside tourism
Sonce & Morje	Sun and the sea
Športni turizem	Sports tourism
Doživetja narave	Experiencing nature
Gastronomija	Gastronomy
Kultura	Culture
Krožna potovanja	Touring
Zdravje & Dobro počutje	Health and wellness
Počitnice v gorah & Outdoor	Mountain and outdoor holidays

Poslovna srečanja	MICE
I: Najpomembnejši produkti s perspektive vpliva na prihodke in na imidž. <i>Promocijska podpora, aktivni produktni razvoj in upravljanje na nacionalni ravni.</i>	I: The most important products from the perspective of the influence on income and on image. <i>Promotional support, active product development, and management at a national level.</i>
- POČITNICE V GORAH & OUTDOOR	- MOUNTAIN AND OUTDOOR HOLIDAYS
- ZDRAVJE & DOBRO POČUTJE	- HEALTH AND WELLNESS
- POSLOVNA SREČANJA & DOGODKI	- BUSINESS MEETINGS AND EVENTS
II: Produkti z močni vplivom na prihodke in imidž.	II: Products with a strong influence on income and image
- DOŽIVETJA NARAVE	- EXPERIENCING NATURE
- GASTRONOMIJA	- GASTRONOMY
- KULTURA	- CULTURE
- KROŽNA POTOVANJA	- TOURING
III: Produkti z manjšim do srednjim vplivom na prihodke in imidž.	III: Products with a low to medium influence on income and image.
- ŠPORTNI TURIZEM	- SPORTS TOURISM
- SONCE & MORJE	- SUN AND BEACH
- TURIZEM NA PODEŽELJU	- COUNTRYSIDE TOURISM

NOSILNI PRODUKTI PO MAKRO DESTINACIJAH

	ALPSKA SLOVENIJA	MEDITERANSKA SLOVENIJA	TERMALNA PANONSKA SLOVENIJA	OSREDNJA SLOVENIJA & LJUBLJANA
POČITNICE V GORAH & OUTDOOR	x x			
ZDRAVJE & DOBRO POČUTJE		x	x	
POSLOVNA SREČANJA	x	x		x
DOŽIVETJA NARAVE	x			
GASTRONOMIJA		x	x	x
KULTURA				x
TOURING				x
ŠPORTNI TURIZEM	x			
SONCE & MORJE		x		
TURIZEM NA PODEŽELJU			x	

SL	EN
NOSILNI PRODUKTI PO MAKRO DESTINACIJAH	CENTRAL PRODUCTS BY MACRO LOCATION
POČITNICE V GORAH & OUTDOOR	MOUNTAIN AND OUTDOOR HOLIDAYS
ZDRAVJE & DOBRO POČUTJE	HEALTH AND WELLNESS
POSLOVNA SREČANJA	MICE
DOŽIVETJA NARAVE	EXPERIENCING NATURE
GASTRONOMIJA	GASTRONOMY
KULTURA	CULTURE
TOURING	TOURING

ŠPORTNI TURIZEM	SPORTS TOURISM
SONCE & MORJE	SUN AND BEACH
TURIZEM NA PODEŽELJU	COUNTRYSIDE TOURISM
ALPSKA SLOVENIJA	ALPINE SLOVENIA
MEDITERANSKA SLOVENIJA	MEDITERRANEAN SLOVENIA
TERMALNA PANONSKA SLOVENIJA	THERMAL PANNONIAN SLOVENIA
OSREDNJA SLOVENIJA & LJUBLJANA	CENTRAL SLOVENIA & LJUBLJANA

Below is a summary of the concept (vision) and key development guidelines for each individual product (source: Strategy for the Sustainable Growth of Slovenian Tourism) and the identified drivers of marketing and development for each product are defined.

MOUNTAIN AND OUTDOOR HOLIDAYS

Year-round holidays in the mountains with an excellent visitor experience and a distinctive offer of active experiences in nature (outdoors) that are easily accessible and meet the needs of high-end visitors.

The Slovenian Outdoor product is among the most competitive in Europe, and it is based on natural elements, high-quality infrastructure, sustainable business practices, and the responsible use of natural and cultural features.

These products have a considerable impact on Slovenia's image as a boutique and active destination with a high added value.

Key measures for improving the competitiveness of HOLIDAYS IN THE MOUNTAINS:

- High-category and luxury hotels and tourist resorts (*greenfield* and *brownfield* investments).
- Updated and expanded cableway infrastructure system.
- Renovation of the cableway infrastructure management system.
- Further upgrades of the outdoor infrastructure (cycling trails, hiking trails, unified trail marking, maintenance and financing system, attractive and innovative panoramic lookouts, etc.).
- Innovative interpretation (development of panoramic trails, interpretation centres).

Key measures for improving the competitiveness of OUTDOOR:

- Professional and attractive outdoor events (innovative events that cover multiple destinations, and outdoor events with great potential for co-branding and launching new sports products by international brands).
- Sustainably-oriented legislation that is friendly to sports agencies and providers and encourages and enables entrepreneurial incentives (concessions, legislation, building permits, etc.).
- Investing public funds (tourist fees) into public tourist infrastructure for outdoor sports.
- The state's active policy with regard to investment in outdoor infrastructure (cycling trails).

- The active cooperation of SMEs in the field of investments in specialised accommodation offer and infrastructure (cycling and hiking accommodation establishments, adrenaline parks, zip-line, etc.).
- Adjusting the cableway infrastructure and public transport to the significant development of the Outdoor product (cableway infrastructure – supply cableways, public transport providers enable the transport of bicycles, sustainable mobility).

Driver of development and marketing: Hiking and Biking Economic Interest Group (Združenja pohodništvo in kolesarjenje GIZ), Association Ropeways of Slovenia (Združenje slovenskih žičničarjev GIZ; joint marketing of the Outdoor product).

BUSINESS MEETINGS AND EVENTS

The highly competitive MICE product with high added value at world-class congress centres, multiple regionally attractive events and shows, an attractive and sought-after location for product launches and demonstrations.

Key measures for improving the competitiveness of BUSINESS MEETINGS & EVENTS:

- At least two new world-class congress and convention centres.
- Improved access by air.
- Professional management of public events and shows in destinations.
- Hosting global or European branded events (related to culture, art, entertainment, and technology).

Driver of development and marketing: Slovenian Convention Bureau

HEALTH AND WELLNESS

A modern and highly competitive offer related to health, prevention, wellness, and selfness, complemented by attractive water experiences for families; it allows year-round operations and stronger penetration of foreign markets. The product has a significant impact on Slovenia's image as a healthy destination.

Key measures for improving the competitiveness of HEALTH AND WELLNESS:

- The consolidation of spa and hotel companies.
- Upscale hotels and tourist resorts, updated health and wellness infrastructure (brownfield and greenfield investments).
- Enhancing specialisation (health, prevention, wellness, selfness, water and thermal getaway).

Driver of development and marketing: Skupnost slovenskih naravnih zdravilišč (Slovenian Spas Association)

EXPERIENCING NATURE

A boutique product for experiencing nature with a high added value, based on the concept of Slovenia's exceptional natural features, sustainable development, excellent interpretation, and distinctive experiences.

Key measures:

- Drafting a national green (sustainable) tourism plan.
- Establishing a sustainable model for visit management.
- Introducing the monitoring of tourism development with regard to tourist and visitor satisfaction.
- The further development of the Green Scheme of Slovenian tourism and the Green Slovenia brand.
- Revaluation of natural resources (drafting a tourism development plan in Slovenia's protected areas).
- Including cultural heritage in the tourist offer.

Driver of development and marketing: Slovenian Tourist Board in cooperation with the Slovenia Green Consortium and providers

SUN AND BEACH

A boutique product with a high added value, based on the concept of a riviera, high-quality beaches, attractive public areas, cultural offerings, small historical towns, summer events, numerous water and other outdoor experiences, and world-class cuisine and wine.

Key measures for improving the competitiveness of SUN AND BEACH:

- High-category and luxury hotels and tourist resorts (greenfield and brownfield investments).
- Improving public beaches (infrastructure and management).
- Arranging public areas at the coast (promenades, squares, walking paths and surfaces, urban public furnishings, sustainable mobility, etc.).

Driver of development and marketing: Considering its geographic limits, the development of the product is in the domain of local communities (4 coastal municipalities), and its marketing is closely linked to the promotion of the destination.

TOWNS, CITIES, AND CULTURE

Ljubljana's attractive City Break product positively affects the entire Towns, Cities, and Culture product in Slovenia, which, through its rich history, colourful cultural events and festivals, art, and the alternative offer of culture, promotes the visits to cities as the end destinations of arrivals; at the same time, however, Ljubljana, Maribor, and other cities and historical towns of Slovenia are becoming attractive stopovers for many passengers in transit across Slovenia.

Key measures for improving the competitiveness of TOWNS, CITIES, AND CULTURE:

- Increasing the competitiveness of art, culture, cultural heritage (modernising museums and developing interpretation centres, developing vibrant city atmospheres, managing city centres, supporting contemporary art, etc.).
- The sustainable commercialisation of cultural features.
- Implementing the “*hub and spokes*” model (including smaller attractive points and their connection to the hub) in the areas of city destinations.
- Improved access by air.
- Strong cooperation between the public and the private sector at a local level.

Driver of development and marketing: Association of Historical Cities of Slovenia (Združenje zgodovinskih mest Slovenije)

GASTRONOMY¹⁹

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

Key measures for improving the competitiveness of GASTRONOMY:

- Enhanced national promotion of cuisine under the Taste Slovenia brand, which vertically links regional and local culinary brands, thus achieving synergies with them.
- Supporting the international recognisability of Slovenian cuisine.
- Supporting small world-class producers of wine and gastronomy products and specialised accommodation providers (wine hotels, wine and spa hotels, interpretation centres).

Driver of development and marketing: In 2017, this product did not yet have a manager who would drive it at an umbrella level.

In 2006, the Slovenian Tourist Board drafted the Development Strategy for Gastronomy in Slovenia, which served as an important basis for more actively including gastronomy in the tourist offer (promotion of gastronomy under the Taste Slovenia slogan); furthermore, the Strategy encouraged a number of regions and destinations to begin developing their own gastronomy strategies by defining a gastronomy pyramid. Multiple regional or local gastronomy brands were created, such as Taste Ljubljana, Taste Central Slovenia, Taste Gorenjska, Taste Rogla, and Dolenjska Delights, etc. Individual chefs and wine-makers have been establishing themselves in the international market (Ana Roš as the World's Best Female Chef 2017). The “Gostilna Slovenija” brand is also present in Slovenia. Due to insufficiently active management, the project has been stagnating, causing members to lose trust in the brand. A comprehensive and systematic approach to enhance and expand (even commercially) the re-evaluation of cuisine (and wines); the measures in this field have been defined in the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of

¹⁹ The product Gastronomy also includes drinks and, in particular, wine.

Economic Development and Technology, 2017): Gostilna Slovenija, product development activities and promoting cuisine under the Taste Slovenia brand by enhancing vertical integration with regional/local culinary brands, establishing culinary diplomacy, and supporting the international recognisability of Slovenian cuisine.

SPORTS TOURISM

The competitiveness of sports tourism is based on high-quality sports and outdoor infrastructure supported by a high-quality hotel offer and supporting services. The image of the product is complemented by 10 to 15 sports championships hosted by Slovenia every year.

Key measures for improving the competitiveness of SPORTS TOURISM:

- Diversifying professional sporting events (hosting individual attractive adrenaline-fuelled and other sports in Slovenian destinations).
- Improving sports infrastructure (for athletes undergoing preparations).
- Professional management of sporting events, commercialisation plan, and the plan for the professional marketing of the product for athletes undergoing preparations.

Driver of development and marketing: In 2017, this product did not yet have a manager who would drive it at an umbrella level.

TOURING

In addition to the organised Touring products, within which our country is a part of tours in Central, Southern, and Eastern Europe, Slovenia will also develop an attractive Touring product based on a large concentration of diverse experiences and attractions at easily manageable distances. In addition to Ljubljana, the location and the offer structure of which makes it the central meeting point, from which visitors can simply explore the region and Slovenia as a whole, individual important points of this exploration are also developed in individual macro destinations.

Key measures for improving the competitiveness of TOURING:

- The national touring system (group or individual touring – camper vans, cars, and motorcycles) that takes advantage of Slovenia's special features as a country that has the Alps, the Mediterranean, the Pannonian Plains, and Central Slovenia (incl. Ljubljana).
- Diversity of unique experiences that are identified in each macro destination – product development is supported with strong promotion.

Driver of development and marketing: Drivers will be established for each macro destination.

COUNTRYSIDE TOURISM

The product is successfully integrated with other products (Health and Wellness, Holidays in the Mountains, Touring, Gastronomy), so it has obtained significant critical mass, which has enabled investments into innovations, development, renovations, and the construction of new offerings. The product is an important catalyst for agricultural production, high-quality authentic cuisine, authentic accommodation offers, and numerous experiences in contact with nature, culture, and people.

Key measures for improving the competitiveness of COUNTRYSIDE TOURISM:

- Support for small providers in the form of various financial schemes for enhancing specialised themed accommodation facilities, for countryside heritage interpretation centres and other additional offerings in the countryside.
- Stronger development of the products Health and Wellness, Holidays in the Mountains, Gastronomy, and other central products as catalysts for countryside tourism development.

Driver of development and marketing: Association of Tourist Farms of Slovenia (Združenje turističnih kmetij Slovenije)

3. BRANDING: Strengthening the I feel Slovenia brand and the concept for communication-related and creative solutions supporting the I feel Slovenia brand

= An activity supporting the increase in Slovenia's recognisability and image as a tourist destination under the brand I feel Slovenia.

In order to achieve new strategic goals, the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism emphasised the significance of the effective management of the umbrella brand I feel Slovenia (and the clearly structured brand architecture, from the umbrella level to the level of the macro destination and then to the product level; furthermore, the significance of creating synergies in communications and promotional activities between the national and the local level have been stressed in particular).

The need for forming a new conceptual communications and creative platform supporting the I feel Slovenia brand (such that would also include what is known as the Big Idea – on the existing foundations of the brand identity) which would serve as the communications umbrella for the entire integrated marketing communications (online and offline) at the umbrella level of Slovenian tourism (organised by the Slovenian Tourist Board) for the next five years was also defined.

The activities arising from this guideline are presented in chapter 4.9.

4. PROMOTION: Focusing on key markets and enhancing digitalisation

= On the basis of analysing markets and priority products (for key markets), the Strategy provided a focus guideline (markets, products, target groups), and the analysis of digital marketing provided some guidelines for optimisation and defined the further enhancement of digitalisation.

Within the framework of a new marketing strategy, the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology, 2017) **defined priorities with regard to markets – the proposal was drafted taking into account the following perspectives:**

- the analysis of the proportion of overnight stays in the 2008–2016 period and the analysis of the annual return on investment (CAGR- *Compound Annual Growth Rate*²⁰),
- the matrix showing growth rates and market proportions for the 2012–2016 period (and takes into account gross domestic product (GDP) per capita; growth of GDP per capita; consumption by foreign visitors; arrivals of foreign visitors),
- market accessibility model, based on attractiveness and the transport-related access to Slovenia from individual markets (accessibility from a market by car (travel time); flight connections (direct connections, flight time); other (distance, travel time – coach, train)).

Based on the performed analysis, the following market groups have been defined:

- **key markets:** Italy, Germany, United Kingdom, France, the Russian Federation,
- **growing prospective markets:** Benelux, Switzerland, Denmark, Finland, Hungary, Poland, Czechia, former Yugoslav states,
- **far markets:** USA, GCC countries, Israel, China, South Korea.

On the basis of the definition of priority markets and central products, the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology) devised a product marketing matrix, which determines which products will be marketed as a priority in particular markets. Priorities have been assigned to products (primary, secondary, tertiary) that indicate a strategic focus for future marketing activities for each market.

²⁰ the CAGR approach shows the average annual growth rate in a defined period.

Chart 6: The products–markets matrix for key markets²¹

	Avstrija	Nemčija	Italija	Rusija	UK	Francija
POČITNICE V GORAH	II	I	I	III	I	II
ZDRAVJE & DOBRO POČUTJE	I	II	I	I	III	III
MICE	Produkt ima svoje distribucijske in promocijske kanale					
OUTDOOR	I	I	II		II	II
KULINARIKA	I	I	I	I	I	I
KULTURA	II	II	II	II	II	I
TOURING	II	II	III	II	II	I
ŠPORTNI TURIZEM	II	III	III			
SONCE & MORJE	III	III	II	I	III	III
TURIZEM NA PODEŽELJU	III	III	III			

I Prioriteta 1
 II Prioriteta 2
 III Prioriteta 3

SL	EN
POČITNICE V GORAH	MOUNTAIN HOLIDAYS
ZDRAVJE & DOBRO POČUTJE	HEALTH AND WELLNESS
MICE	MICE
OUTDOOR	OUTDOOR
KULINARIKA	CULINARY OFFERINGS
KULTURA	CULTURE
TOURING	TOURING
ŠPORTNI TURIZEM	SPORTS TOURISM
SONCE & MORJE	SUN AND BEACH
TURIZEM NA PODEŽELJU	COUNTRYSIDE TOURISM
Avstrija	Austria
Nemčija	Germany
Italija	Italy
Rusija	Russia
UK	UK
Francija	France
Prioriteta 1	Priority 1
Prioriteta 2	Priority 2
Prioriteta 3	Priority 3

From the perspective of the optimisation of marketing channels, the Strategy placed emphasis on the further enhancement of digital channels by increasing funds for digital marketing to a minimum

²¹ Product prioritisations according to individual markets are presented in greater detail in the Appendix to the 2018–2019 STB Work Programme: ID Cards by Market.

of 39% of the budget by 2021. The upgrade opportunities are as follows: further improvement of managing social media, further improvement of the strategy of digital content marketing, creative use of technologies, improvement of B2B digital maturity, the use of the digital path to purchase for the constant improvement of the customer experience, and the increase in conversion rate.

The guidelines have been taken into consideration when defining markets and activities in individual markets (chapters 4.3 and 4.4).

4. STB 2018/2019 Work Programme

4.1 Key goals of the STB in 2018 and 2019

The goals of Slovenian tourism and of the STB are based on the guidelines of the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism. Furthermore, the basic guidelines from the strategic document 2016–2020 Strategy for the Development of the Slovenian Tourist Board (STB, 2015) have also been taken into consideration.

Key goals of the STB in 2019 and 2018

1. **Increasing Slovenia's recognisability and image** as a tourist destination under the brand I feel Slovenia.
2. **Sustainable growth** by increasing arrivals and overnight stays throughout the year (365 days of Slovenian tourism).
3. **Geographic dispersion of flows** across Slovenia (also with the support of implementing the concept of four macro destinations).
4. **Increasing consumption** (extending the average duration of stay and consumption, and strengthening products with higher added value).
5. **Focusing on high-end visitors** seeking high-quality, diverse, and active experiences, peace, and personal benefits.

Table 2: Strategic goals of Slovenian tourism²²

Strategic objectives	Indicators	Calculation method	The base year (2016)	Expected annual result 2018/2019
		Unit of measurement (percentage)		
1 Increasing tourism turnover	Exports of travels	SURS methodology (export of travel: number of passengers (daytrippers, estimate), passengers in transit (estimate), overnight stays (TU/M))*consumption (TU) of the current year/export of travel: number of passengers (daytrippers (estimate), passengers in transit (estimate), overnight stays (TU/M))*consumption (TU) of the previous year)* 100	EUR 2.19 billion ²³	+ 12 % compared to the previous year
2 Increase in the number of overnight stays	Number of overnight stays	SURS methodology (comparison: previous year/current year)* 100	11,179,879 ²⁴	+ 8 % compared to the previous year
3 Increasing the number of arrivals	Number of arrivals	SURS methodology (comparison: previous year/current year)* 100	4,317,504 ²⁵	+ 3% compared to the previous year

4.2 Budget structure

²² The strategic goals of Slovenian tourism are defined in the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism

²³ Source: Bank of Slovenia; revised data for 2016

²⁴ Source: Statistical Office of Slovenia, 2016 annual data (taking into consideration accommodation capacities with fewer than 10 beds)

²⁵ Source: Statistical Office of Slovenia, 2016 annual data (taking into consideration accommodation capacities with fewer than 10 beds)

In 2018 and 2019, EUR 11,450,000 per year was earmarked for promotion (of which EUR 10,800,000 was provided by the Ministry of Economic Development and Technology and EUR 650,000 came from our own funds).

Marketing communications (digital and classic communications, public relations, conventions and workshops, business events, joint promotion projects): EUR 9,420,000, i.e. 82% of programme funds, will be earmarked for marketing communications. In 2018 and 2019, marketing communications activities will be carried out in key markets, growing prospective markets, and distant markets. A marketing communication mix will be devised for each market, and the main tourist products and target groups will be defined; the activities are presented in the Appendix: ID Cards by Market.

Marketing infrastructure (website, creating content, promotional material, studies, development, European projects, brand, other projects): in 2018 and 2019, EUR 2,030,000, i.e. 18% of programme funds, will be earmarked for marketing infrastructure.

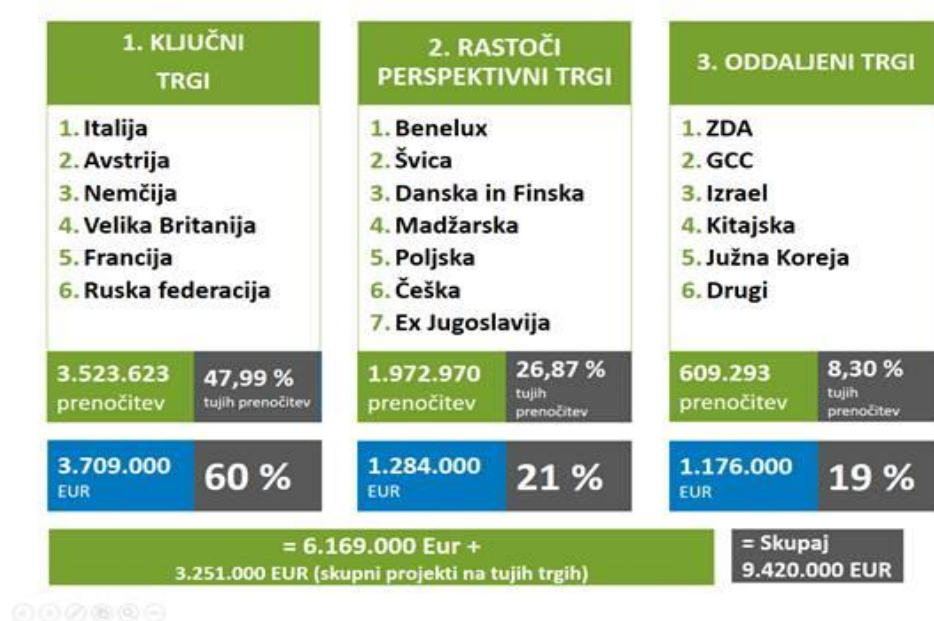
Promotion resources (budgetary and own resources)	2018	Proportion	2019	Proportion	Index 19/18
I. MARKETING COMMUNICATIONS	9,420,000	82%	9,420,000	82%	100
Digital and classic communications, public relations, conventions and workshops, business events, joint promotional projects <i>Key markets, growing and prospective markets, distant markets, and joint promotional projects</i>					
II. MARKETING INFRASTRUCTURE	2,030,000	18%	2,030,000	18%	100
Website, creating content, promotional material, studies, development, European projects, brand, other projects					
TOTAL	11,450,000	100%	11,900,000	100%	100

4.3 Marketing communications

4.3.1 Target markets

In 2018 and 2019, EUR 9,420,000 per year will be spent on marketing communications in foreign markets.

Chart 7: The structure of the marketing communications funds for 3 sets of markets



4.3.1.1 Foreign markets: key markets

SL	EN
1. KLJUČNI TRGI	1. KEY MARKETS
1. Italija	1. Italy
2. Avstrija	February Austria
3. Nemčija	3. Germany
4. Velika Britanija	4. UK
5. Francija	5. France
6. Ruska federacija	6. Russian Federation
3.523.623 prenočitev	3,523,623 overnight stays
44,99% tujih prenočitev	44.99% of overnight stays by foreigners
3.709.000 EUR	EUR 3,709,000
2. RASTOČI PERSPEKTIVNI TRGI	February GROWING PROSPECTIVE MARKETS
1. Benelux	1. Benelux
2. Švica	February Switzerland
3. Danska in Finska	3. Denmark and Finland
4. Madžarska	4. Hungary
5. Poljska	5. Poland
6. Češka	6. Czechia
7. Ex Jugoslavija	7. Former Yugoslavia
1.972.970 prenočitev	1,972,970 overnight stays
26,87% tujih prenočitev	26.87% of overnight stays by foreigners

1.284.000 EUR	EUR 1,284,000
3. ODDALJENI TRGI	3. DISTANT MARKETS
1. ZDA	1. USA
2. GCC	2. GCC countries
3. Izrael	3. Israel
4. Kitajska	4. China
5. Južna Koreja	5. South Korea
6. Drugi	6. Other
609.293 prenočitev	609,293 overnight stays
8,30% tujih prenočitev	8.30% of overnight stays by foreigners
1.176.000 EUR	EUR 1,176,000
= 6.169.000 Eur + 3.251.000 EUR (skupni projekti na tujih trgih)	= EUR 6,169,000 + EUR 3,251,000 (joint projects in foreign markets)
= Skupaj 9.420.000 EUR	= total EUR 9,420,000

► **Italy, Austria, Germany, United Kingdom, France, and the Russian Federation (= 3.52 million overnight stays or 48% of foreign overnight stays)**

In 2018 and 2019, marketing communications funds in the amount of **EUR 3,709,000** per year, i.e. 60% of the funds for foreign markets (excluding funds for joint/global projects), will be earmarked for KEY MARKETS.

In these markets, the emphasis is on digital content marketing, communication with the end customer (B2C) – through world-class content or stories – and on addressing target segments through specific products. At the same time, the cooperation with the business public is still being strengthened (B2B).

ITALY – PVT MILANO

► **2016:15.6% overnight stays (1st place) ► 8.6% more overnight stays compared to 2015**

Just over 30 million Italians travel every year, which accounts for approximately half of Italy's population. No less than 80% of those who can afford to go on holiday spend their holidays in Italy, and the remaining 20% go abroad. In 2016, there were more than half a million Italian tourists in Slovenia, which means that Slovenia has an 8% market share of Italian tourists spending their holidays abroad.

Key points:

- Our promotion will focus on northern Italy and will highlight the coast, spas, and active holidays in the Alps, gastronomy, and culture.

AUSTRIA – PVT VIENNA

► 2016: 11.4% overnight stays (2nd place) ► 7.7% more overnight stays compared to 2015

Austrians generate approximately 18 million tourist trips per year; half of these are short trips (up to three overnight stays) and just under a half are long trips (4 overnight stays or more). Austrians prefer to spend their holidays abroad rather than in Austria; only about a third of Austrians spend their holidays in their homeland. Due to good economic conditions and a close connection to the German economy, an increase in Austrian travels can be expected in the future, both in Austria and abroad.

Key points:

- In Austria, the offer related to active getaways in unspoilt nature will be emphasised (a considerable increase in the interest in products, such as the Alpe Adria Trail) in combination with an excellent culinary offer and especially culture, which has connected our two countries for centuries.

GERMANY – PVT MUNICH

► 2016: 11.2% overnight stays (3rd place) ► 7.7% more overnight stays compared to 2015

Germany is the third strongest tourist market in the world (after the USA and China) and the largest European market with almost 70 million trips longer than 4 days and 77 million shorter trips, on which Germans spend approximately EUR 90 million. When selecting holiday destinations, a third of Germans opt to spend their holidays in Germany, a third spend their holidays in the Mediterranean, and a third go to different other world destinations.

Key points:

- From a marketing perspective, we will focus on Baden Württemberg, and we will emphasise getaways in nature (Holidays in the Mountains), the Mediterranean in conjunction with wellness and cuisine (and also as a part of the popular City Break holidays).
- We wish to make a positive shift in the pre- and post-seasonal period; the Advent offerings will also be marketed.
- Medical tourism will be developed in cooperation with insurance undertakings.

UNITED KINGDOM – IT LONDON

► 2016: 4.3% overnight stays (6th place) ► 13.9% increase compared to 2015

From the perspective of the tourism sector, 2016 was a year full of challenges for the British market, as it was affected by terrorism and Brexit. Regardless of everything that happened, the UK experienced an increase in travel abroad and an increase in travel per person in 2016. For British people, the European Union is the principal receptive market. It is well known that British guests are the least susceptible to seasonal fluctuations, as they travel all year round. However, the weak pound following the vote on Brexit is a threat to the future accessibility to travel and travel habits of British people.

Key points:

- We see opportunities in developing and promoting products, such as active City Break holidays and niche products, such as api (bee) tourism and microadventures.
- We also see potential in health resorts and spa tourism as an integral part of ad hoc luxury experiences. We will continue to promote sustainable tourism that is very highly valued in this market.

FRANCE

► 2016: 2.7% overnight stays (12th place) ► 11.0% more overnight stays compared to 2015

France has an exceptional tourist potential, arising from the size of this market with 66 million people with the largest number of holiday days in the world. It is typical for the French to have a minimum of 5 weeks of annual leave, and no fewer than 7.5 weeks on average. Last year, about 80% of French people travelled during their annual leave; 35% of them, i.e. 1.3 million, went abroad. European destinations welcome about 70% of those French people who travel abroad. A shift in selecting tourist destinations is also typical for the French market; geopolitical unrest is the reason for them choosing not to visit the once popular African destinations. The French prefer to spend their holidays in nearer and safer Southern European destinations.

Key points:

- In France, we will emphasise towns, cities, and culture, cuisine, and holidays in the mountains (active getaways).

RUSSIAN FEDERATION

► 2016: 2.9% overnight stays (11th place) ► 6.5 % fewer overnight stays compared to 2015

According to VCIOM (Russian Public Opinion Research Center), the 2016 tourist year was mainly marked by savings and cancelling planned travels abroad. During the summer months, only 55%

of the population went away during their annual leave. In general, in the first half of 2016, the number of Russian tourists who spent their holidays abroad decreased by 13% compared to the same period in 2015. Russian guests focus on high-end offerings, they mainly travel for the purpose of summer holidays (the Sun and Beach product); they also visit spa destinations, which are also present in Slovenia.

Key points:

- In the Russian Federation, we will emphasise the spa offer, Slovenian Istria, and the Gastronomy product.

4.3.1.2 Foreign markets: growing prospective markets

- Benelux, Switzerland, Denmark, and Finland, Hungary, Poland, and Czechia, Croatia, and Serbia
- 1.97 million overnight stays or 26.87% of overnight stays by foreign guests

In 2018 and 2019, marketing communications funds in the amount of **EUR 1,284,000** per year, i.e. 21% of the funds for foreign markets (excluding funds for joint/global projects), will be earmarked for GROWING PROSPECTIVE MARKETS.

In these markets, the emphasis is on digital content marketing, communication with the end customer (B2C) – through world-class content or stories and addressing target segments through specific products. At the same time, the cooperation with the business public is still being strengthened (B2B).

4.3.1.3 Foreign markets: far markets

- USA, GCC countries, Israel, China, South Korea ► 0.61 million overnight stays, accounting for 8.3% of overnight stays by foreign guests

In 2018 and 2019, marketing communications funds in the amount of **EUR 1,176,000** per year, i.e. 19 % of the funds for foreign markets (excluding funds for joint/global projects), will be earmarked for DISTANT MARKETS.

In these markets, Slovenia has been systematically present for a number of years, but to a limited extent. **In the coming year, we will increase the proportion of promotional funds for these markets, with the goal of taking advantage of the high growth level related to tourists from these countries.**

We will enter distant markets through partnerships with the Slovenian tourist sector and in partnership with our neighbouring countries, with which we can develop attractive and competitive products; in cooperation with airlines, we can increase the inflow of tourists from these markets.

Slovenia will carry out systematic promotion in countries that are also priority countries within Slovenia's economic programme, including the United Arab Emirates and Kuwait. New markets will be developed at the same time. The course of events in the Iranian market will be studied; this market seems to be a prospective market with evident opportunities for the Slovenian economy in the future. Furthermore, we will begin developing the new Australian market.

4.3.1.4 Joint promotional projects – communicating with the business public

► **In addition to activities in individual markets, so-called joint promotional projects will also be carried out, which cannot be divided among individual markets or market groups because of their global nature.**

In 2018 and 2019, **EUR 3,251,000** of marketing communications funds will be earmarked for JOINT PROMOTIONAL PROJECTS.

The funds will be intended for:

1) Global conventions abroad:

1. FITUR Madrid (17–21 January 2018, January 2019);
2. ITB Berlin (7–10 March 2018, March 2019);
3. IMEX Frankfurt (15–17 May 2018, May 2019);
4. TTG Rimini (October 2018, October 2019);
5. WTM London (November 2018, November 2019);
6. IBTM World Barcelona (November 2018, November 2019).

2) Business or B2B events in Slovenia:

1. CONVENTA (January 2018, January 2019);
2. SIW 2018 (May 2018, May 2019);
3. Active Holiday Workshop (Borza aktivnih počitnic; October 2018, October 2019);
4. DST – Days of Slovenian Tourism (Dnevi slovenskega turizma; October 2018, October 2019);
5. Bled Strategic Forum (Blejski strateški forum; September 2018, September 2019);
6. SPACE (November 2018, November 2019).

3) Global promotional projects:

1. IGTM in Ljubljana (15–19 October 2018);

2. EUROSPOORT – cycling race around Slovenia (June 2018, June 2019);
3. Mountain biking championship (Slovenia, Austria);
4. Other promotional projects:

4) Specialised products:

1. Cooperation with the Slovenian Film Centre: e.g. Cannes Film Festival (May 2018, May 2019).

5) Other activities:

1. Alpe Adria hiking trail;
2. Alpe Adria Golf;
3. Conventions;
4. International membership fees for promotional programmes;
5. Global e-communications on social media, direct content marketing;
6. Promotional activities in distant markets by addressing tour operators;
7. Activities with the goal of encouraging air connections.

4.3.1.5 Domestic market

► In 2016, domestic guests generated 5.3% more arrivals and 3.0% more overnight stays compared to the year before. In the guest structure, domestic guests achieved a 34.3% proportion of overnight stays.

The Slovenian Tourist Board carries out activities in foreign markets, and in the domestic market, a marketing platform in Slovenia is provided (website, development aspect, etc.), the integration among destinations and tourist providers is supported, and the development of innovative products and green tourism is promoted.

4.3.2 Communication tools

A communication mix of various market communication tools have been prepared for each market. In 2018 and 2019, we are continuing to focus on digital content marketing. If the funds for marketing communications in foreign markets is taken as the basis, from the perspective of market communications tools, 14% of the funds will be earmarked for business workshops and trade conventions, 42% for digital advertising, 20% for conventional advertising, 13% for public relations, and 11% for promoting sales (events with tour operators).

4.3.2.1 Creating content

The strategic focus on developing and implementing digital content marketing has proved to be the right direction for development – the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology, 2017) has also confirmed that this focus is correct and that it should be enhanced further. On the basis of the Strategy for Digital Content Marketing, key development guidelines and short- and medium-term measures have been formed. Within the scope of short-term measures, the STB Editorial Council consisting of editors of individual STB communications channels has been formed. The formation of an umbrella annual editorial calendar created by the Editorial Council in cooperation with the STB and destinations has also proved to be an effective tool for managing content. By defining central monthly topics, related tourist contents encompassing the current tourist offerings, news, and other emphases by means of which we wish to attract potential guests to visit Slovenia are formed. The content/products related to the leading annual topic (culture) are particularly stressed.

In addition to preparing the editorial calendar, the formation of content as a whole encompasses the actual drafting of texts and acquiring of photographs, 360-degree images, cinemagraphs, animations, and videos, by means of which the text in interactive articles/stories is supported. These serve as the basis for posts on all of STB's digital channels, in accordance with the editorial calendar.

4.3.2.2 Advertising campaigns

Advertising campaigns mainly encompass digital campaigns as a significant part of the marketing focus of the STB, by using modern, technological digital tools at the umbrella level and through partnerships that are of key importance for fulfilling the goals of the STB. Conventional advertising (TV advertising, printed media – lifestyle magazines and other influential media, external advertising) will generally be carried out to complement digital communications, focusing of content marketing in key or prospective markets.

The development of digital marketing dictates the development of new technologies, the exponential growth of the use of mobile phones, and the expansion of broadband internet. Due to mobile internet access and the lowering of mobile service prices, mobile services are becoming accessible to all generations everywhere. A new user experience is formed, which is also followed

by digital marketing. The so-called native platforms, which reach users through unobtrusive content, have begun to innovatively take advantage of the over-saturated advertising space. At the same time, the system of marketing sales space has been replaced by programmatic buying, which is based on real-time demand and supply (real-time bidding). This way, a more focused advertising for target groups that we wish to address is achieved.

In accordance with this, digital campaigns have been divided into two parts:

1. programmatic digital campaigns, and
2. digital content campaigns.

Programmatic campaigns encompass media buying on all platforms on which the advertiser can lease advertising space through bidding. Such advertising encompasses:

- social networks (Facebook, Instagram, YouTube),
- search advertising (Google, Yandex),
- specific programmatic advertising (native advertising networks).

Content campaigns are the umbrella image national campaigns that are divided into two parts based on the advertising goal:

1. Increasing Slovenia's recognisability and enhancing its tourist brand I feel Slovenia.

By annually carrying out proactive marketing digital campaigns in individual target markets through a uniform visual creative concept that builds on innovative approaches. This refers to advertising in prestigious printed and digital lifestyle and other influential global media, such as the National Geographic, Elle, CNN, in catalogues and magazines of prestigious associations of tour operators, e.g. Virtuoso, Travel Beyond, etc.

2. Increasing the likelihood of selecting a destination for spending holidays in the form of a product sales campaign.

This campaign is intended for near markets that are accessible to passengers in transit, i.e. to those target groups that come to Slovenia or are on their way to neighbouring countries (mostly Croatia) in their own means of transport: car, camper van, or other personal motor vehicles. Purchasing a toll sticker presents a major obstacle for these passengers, as these stickers are an additional cost in their holiday budget as they travel; these costs need to be paid at a uniform price for a short distance that is travelled across only once. From this perspective, they deem this purchase irrational.

The campaign resolves the problem of purchasing toll stickers, namely as an opportunity to visit Slovenia in a way that nullifies the cost of the purchase or allows visitors to use it to obtain additional benefits. The product campaign will be connected to the most important annual event (important anniversaries, UNESCO destinations, etc.) and, at the same time, it will take advantage of special events and additionally emphasise them for promotional purposes. The campaign addresses passengers in transit, i.e. individual guests and families, in a focused manner. This is a new creative solution with promotional activities that are uniform from a content and visual perspective and that support the I feel Slovenia brand; however, it addresses target visitors in a manner that is specific to this campaign. The goal is to keep passengers in transit in Slovenia or to direct such visitors to cross Slovenia in order to reach their desired location in a neighbouring country, but still taking advantage of making a stop in Slovenia to see tourist attractions or spend a short holiday. The campaign will be carried out in near markets and in Czechia and Poland.

Campaigns will be carried out in accordance with the bottom-up principle, and they will be supported by specific digital promotion of the tourist products of the Slovenian tourist industry and individual tourist destinations that partner up.

4.3.2.3 Public relations and social media

Useful, interesting, and authentic stories will be a significant guideline for all communications activities with regard to foreign public relations and social media. The development of social media also affects public relations. On the basis of a devised Strategy for Content Marketing, the STB introduced multiple content editorial tools as a priority, it upgraded content infrastructure, and introduced new, modern tools for effective communication management. Through a systematic and directed process of interactive communication with the media and other segments of the public, we will build the positive image of Slovenia and gain the approval of all segments of the public.

When planning and performing activities in key, growing, and distant markets, continuous cooperation with professional PR agencies will be established. We will continue to publish e-news in English (News from Slovenia for foreign media, twice a month), we will prepare stories about Slovenia and the Slovenian tourist offer on a monthly basis (Stories from Slovenia, the B2C public). These stories will be in all of the languages published on the www.slovenia.info website.

At the same time that contents and the functionalities of the www.slovenia.info website are updated, modern and interactive business pages intended for foreign media are also planned. The contents

of the **MEDIA LIBRARY (MEDIATEKA)** will be constantly upgraded (with new photographic, video, and audio contents) and enriched, and a new modern application for sending e-news will be developed. With regard to drafting messages for foreign media, we are planning to **introduce the so-called MULTIMEDIA NEWS RELEASE (integration of video and photo contents and social media into the messages for foreign media)**.

Study trips for representatives of foreign media and the so-called social media influencers will continue to be an important part of the activities, whereby they will be even more focused on and oriented towards acquiring the most influential journalists, influencers, and influential individuals on social media. Due to the ever increasing significance of video content (experts predict that, in the next five years, contents will be primarily based on videos), special attention will be paid to the production of video content and video blogs. The influence that individuals who create content online (visual and written) have on decision-making and the positive image of a destination is increasing; these individuals are called influencers. They use different platforms to publish content on individual destinations, thus interactively influencing the opinion of individuals within interested and/or target groups. Through them and with clearly set goals, we will achieve greater promotional effects and public relations effects. Individuals will be able to become ambassadors of Slovenia and its tourist products. We will also continue to organise various events for foreign media abroad, in cooperation with the Slovenian tourist industry.

Communication on social media will be additionally enhanced in accordance with target groups (personas) for individual social networks. The manner of providing content will be enhanced through an editorial approach for individual social media. In the future, greater inclusion of social networks at the level of corporate communication will be required (regular communication at professional and business events, with foreign media, etc.). The key shift that we wish to achieve in this field, in addition to acquiring new followers, is to establish interaction, so we will make more efforts to encourage interaction and quick responses to questions, comments, and initiatives made by followers.

4.3.2.4 Automated marketing tool

High-quality relationships with our target groups at the B2C and B2B levels are of key importance for a successful implementation of the STB Work Programme for 2018 and 2019.

The goal of the STB is to upgrade the CRM tool in accordance with the latest technological trends and the integration with the new automated marketing tool and to effectively support the implementation of the STB's strategy for digital content marketing. This will allow us to maintain

and develop relationships with existing users in the long term, while at the same time building on the base of new users by applying new marketing concepts.

4.3.2.5 Business workshops and trade conventions in 2018 and 2019 (B2B and B2C)²⁶

52 workshops and conventions will be held in 2018 and 2019: organised by the STB and STB representative offices abroad (22) and in cooperation with partner organisations (product conventions for the general public) (30). Conventions and workshops are held in markets depending on strategic focuses in marketing and the interest of the economic sector in participating (30% of the costs are covered through the participation of industry representatives).

TRADE CONVENTIONS AND WORKSHOPS ORGANISED BY THE STB				
DATE	EVENT NAME	CITY	COUNTRY	TYPE
9–14 January 2018, January 2019	Vakantiebeurs	Utrecht	Netherlands	Trade show
11–14 January 2018, January 2019	Ferienmesse	Vienna	Austria	Trade show
13–21 January 2018, January 2019	CMT	Stuttgart	Germany	General trade show
17–21 January 2018, January 2019	FITUR	Madrid	Spain	Stock Exchange
18 January 2018, January 2019	Bussines Forum MATKA	Helsinki	Finland	Workshop/trade show
2–5 February 2018, February 2019	Vakantie Salon	Brussels	Belgium	Trade show
6–7 February 2018, February 2019	IMTM	Tel Aviv	Israel	Trade show/workshop
21–25 February 2018, February 2019	F.R.E.E.	Munich	Germany	Trade show
22–25 February 2018, February 2019	IFT	Belgrade	Serbia	Trade show
7–10 3 2018, March 2019	ITB	Berlin	Germany	Stock Exchange
11–13 March 2018, March 2019	BIT	Milan	Italy	Workshop
13–15 March 2018, March 2019	MITT	Moscow	Russia	Workshop
April 2018, 2019	Freizeit	Klagenfurt	Austria	Trade show
April 2018, 2019	Argus Bike Festival	Vienna	Austria	Cycling trade show

²⁶ The number and type of workshop or trade convention can slightly change. In the event that there is interest by the tourist industry, certain additional conventions and presentations will be carried out and the costs will be covered by our partners.

21–25 April 2018, April 2019	ATM	Dubai	UAE	Workshop
16–18 May 2018, May 2019	ITB China	Shanghai	China	Stock Exchange
15–17 May 2018, May 2019	IMEX	Frankfurt	Germany	Trade exhibition
3–4 July 2018, July 2019	RDA	Cologne	Germany	Workshop – coach tourism
September 2018, 2019	Top Resa	Paris	France	Workshop
October 2018, 2019	TTG	Rimini	Italy	Workshop
November 2018, 2019	WTM	London	UK	Workshop
November 2018, 2019	IBTM World	Barcelona	Spain	Trade exhibition

TRADE SHOWS IN COOPERATION WITH PARTNER ORGANISATIONS				
DATE	EVENT NAME	CITY	COUNTRY	TYPE
12–14 January 2018, January 2019	Reiseliv	Oslo	Norway	General trade show
13-14 January 2018, January 2019	Farrad & Erlebnis Reisen mit Wandern	Stuttgart	Germany	Hiking/cycling trade show
18–23 January 2018, January 2019	Caravan Salon	Leeuwarden	Netherlands	Camping trade show
18–21 January 2018, January 2019	Go	Brno	Czechia	General trade show
19–28 January 2018, January 2019	Grüne Woche	Berlin	Germany	Food trade show
20–21 January 2018, January 2019	Adventure Travel Show	London	UK	Hiking/cycling trade show
21–25 February 2018, February 2019	Caravaning Reise	Essen	Germany	Hiking/cycling/camping trade show
25–28 January 2018, January 2019	ITF SlovakiaTour	Bratislava	Slovakia	General trade show
15–18 February 2018, February 2019	Holiday World	Prague	Czechia	General trade show
24–26 February 2018, February 2019	Pescare Show	Vicenza	Italy	Fishing trade show
23–25 February 2018, February 2019	Ferie for alle	Herning	Denmark	Camping trade show
2–4 March 2018, March 2019	Fiets en Wandelbeurs	Utrecht	Netherlands	Hiking/cycling trade show
5–8 March 2018, March 2019	Seatrade	Miami	USA	Cruise trade show
March 2018, 2019	Book fair	Leipzig	Germany	Book fair
23–24 March 2018, March 2019	Fly Fishing Fair	London	UK	Fishing trade show

23–25 March 2018, March 2019	Salon du Randonneur	Lyon	France	Hiking/cycling trade show
10–13 April 2018, April 2019	Riyadh Travel Fair	Riyadh	Saudi Arabia	General trade show
June 2018, 2019	The Meeting Show	London	UK	Trade show
Aug./Sept. 2018, 2019	Caravan Salon	Düsseldorf	Germany	Camping trade show
September 2018, 2019	TourNatur	Düsseldorf	Germany	Hiking/cycling trade show
September 2018, 2019	Il Salone del Camper	Parma	Italy	Camping trade show
October 2018, 2019	Vehicules de Loisirs Paris	Paris	France	Camping trade show
October 2018, 2019	Gesund & Wellness	Linz	Austria	Spa/wellness trade show
October 2018, 2019	Ski & Snowboard Show	London	UK	Ski trade show
October 2018, 2019	IMEX America	Las Vegas	USA	Trade show
October 2018, 2019	Frankfurt Book Fair	Frankfurt	Germany	Book fair
November 2018, 2019	Die Familienmesse	Klagenfurt	Austria	Spa/wellness trade show
November 2018, 2019	Expo Pozim	Belgrade	Serbia	Ski trade show
December 2018, 2019	ILTM	Cannes	France	Luxury trade show

4.3.2.6 Promoting sales

Promoting sales in the form of business events or workshops and study trips is intended for communicating with tour operators, agencies, and other business segments of the public. **Some activities will be carried out in European markets, but mostly in distant markets. Workshops on Slovenian tourism will mainly be held abroad, but some also in Slovenia.**

A LIST OF BUSINESS EVENT FOR PROMOTING SALES				
DATE	EVENT NAME	CITY	COUNTRY	TYPE
February 2018, 2019	B2B Luxury & MICE	Almaty	Kazakhstan	WS
February 2018, 2019	B2B Luxury & MICE	Baku	Azerbaijan	WS
February 2018, 2019	B2B Luxury & MICE	Tbilisi	Georgia	WS

February 2018, 2019	WS Korea	Pyeongchang, Seoul	South Korea	WS
February 2018, 2019	WS Japan	Tokyo	Japan	WS
February 2018	WS or Australia presentation	Sydney, Melbourne	Australia	WS or presentation
March 2018, 2019	WS France	Paris	France	WS
April 2018, 2019	Roadshow USA	New York, Chicago	USA	WS
May 2018, 2019	DST Zagreb	Zagreb	Croatia	B2C presentation
May 2018, 2019	Roadshow China	Guangzhou, Hong Kong	China	WS
September 2018	WS Belgrade	Belgrade	Serbia	WS
September 2018	WS Brussels	Brussels	Belgium	WS
September 2018	WS Amsterdam	Amsterdam	Netherlands	WS
October 2018, 2019	WS Budapest	Budapest	Hungary	WS
October 2018, 2019	WS Prague	Prague	Czechia	WS
October 2018, 2019	WS Warsaw	Warsaw	Poland	WS
BUSINESS EVENTS IN COOPERATION WITH PARTNER ORGANISATIONS				
April 2018, 2019	WS	Istanbul	Turkey	WS
April 2018, 2019	WS	Zagreb	Croatia	WS
BUSINESS EVENTS IN SLOVENIA				
January 2018, 2019	CONVENTA	Ljubljana	Slovenia	Stock Exchange
May 2018, 2019	SIW	Slovenia	Slovenia	Stock Exchange
September 2018, 2019	Bled Strategic Forum	Bled	Slovenia	Meeting
October 2018, 2019	NATOUR	Ljubljana	Slovenia	Stock Exchange
October 2018, 2019	Days of Slovenian Tourism		Slovenia	Meeting
15–19 October 2018	IGTM	Ljubljana	Slovenia	Workshop
November 2018, 2019	SPA-CE		Slovenia	Workshop

4.3.3 STB work performance indicators – INTERNAL BUSINESS PROCESS PERSPECTIVE

Strategic focus: EFFECTIVE MARKETING

Strategic objectives		Indicators	manner of calculation: the unit of measure	The base year (2016)	Expected annual result – 2018/2019
P1	Fulfilling planned activities	Fulfilling planned activities	(P1/a-c indicators)		
DIGITAL CONTENT MARKETING					
P1/1a	Fulfilling the media plan	Drafting the media plan	fulfilling the drafting of the media plan number	1	1/1
P1/2a	Performing preparations for a global digital campaign	Preparations for a global digital campaign	performing preparations for a global digital campaign number	1	1/1
P1/3a	Increasing the number of newsletter users	Increasing the number of newsletter users	(the achieved number of newsletter users in the current year/the achieved number of newsletter users last year) * 100 Percentage	70,000	min 10%/ min 10%
P1/4a	Video content for product promotion for the Media Library	Preparing and implementing new video content for product promotion for the Media Library	Utilising new video content for product promotion for the Media Library Number	142	10/10
P1/5a	Product images for the media library	Preparing and implementing new photographs for product promotion for the Media Library	Utilising new photographs for product promotion for the Media Library number	2,000	1,000/1,000
P1/6a	Reaching a number of foreign press members on study trips	The number of foreign press members on study trips in Slovenia	number of foreign members of press in Slovenia number	360	200/200
COMMUNICATING WITH THE BUSINESS PUBLIC					
P1/1b	Organising workshops and conventions	Achieved number of planned workshops	achieved number of workshops and conventions Number	48	min 30/ min 30

		and conventions			
P1/2b	Performed workshops abroad	Achieved number of planned workshops in foreign markets	achieved number of workshops in foreign markets Number	23	min 10/ min10
P1/3b	Carrying out incoming workshops in Slovenia	Achieved number of planned incoming workshops in Slovenia	achieved number of incoming workshops in Slovenia Number	4	min 3/ min 3
P1/4b	Carrying out the Days of Slovenian Tourism	Carrying out and event within Days of Slovenian Tourism	holding the event Number	1	1/1

4.4 Marketing infrastructure

4.4.1 Creating website content

We will continue to implement content on a user-friendly platform (website) with the latest technology, in accordance with a clearly set goal encouraging users to explore Slovenia as a tourist destination and its tourist products and increasing the users' desire to carry out their trip.

We wish to bring the new website closer to users, so **website personalisation will be performed**. Furthermore, we wish to introduce artificial intelligence technologies and the Internet of Things, thus becoming a trendsetter in this field among other tourist websites in the world.

We will continue to make efforts to expand our knowledge and experience in digital trends in tourism and transfer this to the stakeholders of the Slovenian tourist industry down to the local level; therefore, **various forms of educational programmes (workshops, webinars, online news) will be used to educate and train all those interested** in content and technological digitalisation and the use of modern communications techniques.

4.4.2 Producing promotional publications

With regard to concepts and content, the production of publications will follow the vision for the development of Slovenian tourism 'Slovenia is a green boutique global destination for high-end visitors seeking diverse and active experiences, peace, and personal benefits' as a promotional

support for the identified central tourist products and support for the enhancement of the recognisability of the I feel Slovenia brand.

PRODUCTION UMBRELLA LEVEL

In 2018 and 2019, at the production umbrella level covering the general promotional materials on Slovenia, we will issue publications in printed and digital formats, which will be, with regard to content and concepts, adapted to the needs of modern consumers and identified key target groups.

In the field of digital catalogues, the activities with regard to the general digital catalogue will be maintained. With the purpose of following global trends and the method for obtaining information used by potential tourists in the research phase of making a decision on the choice of a destination, additional digital catalogues will be created, in accordance with the publication of printed publications.

As an additional communication tool, digital catalogues will coherently complement the STB's other promotional activities in the field of advertising, digital marketing, appearances at conventions, and sales promotion.

PRODUCTION-RELATED PARTNERSHIPS

We will actively continue our partnership cooperation at the product level with regard to publications, namely in cooperation with expert organisations. With the purpose of providing publications with suitable content and sufficient scope for the promotional activities of the STB and its partners, and provided that a partnership agreement is entered into or that the STB carries out production independently, additional support will be provided to existing, new, innovative, and sustainable tourist products.

Production will place greater emphasis on integrating products into cohesive units, stressing key sustainably-oriented tourist products, creating high-quality content on the basis of storytelling, providing high-quality photo materials, and sharing informative content enquired about by modern tourists.

PUBLICATION PRODUCTION OVERVIEW

PUBLICATIONS	(P/D) *	LANGUAGE **	CIRCULATION	DATE OF PUBLICATION
UMBRELLA LEVEL				
General Catalogue of Slovenia, new edition	P	6 language versions	100,000	2018
General Catalogue of Slovenia – reprint	P	depending on inventory	depending on inventory	2019
Tourist Map of Slovenia – new edition	P	6 language versions	150,000	2018
Tourist Map of Slovenia – reprint	P	depending on inventory	depending on inventory	2019
Travel Agent Manual	P	ENG, GER	5,000	2018
Travel Agent Manual	P	ENG, GER	5,000	2019
Digitalisation 2018	D			2018
Digitalisation 2019	D			2019
PARTNER – PRODUCT LEVEL				
Partner/product publications 5x new editions	P	multiple language versions	160,000	2018/ 2019
Partner/product publications 5x reprints	P	depending on inventory	depending on inventory	2018/ 2019

*P – printed; D – digital

** the versions in additional languages after basic language versions are drafted (English, German, Italian, French) will be selected depending on the inventory of the existing editions and the additionally expressed needs.

4.4.3 Creative promotional products

Promotional products with the I feel Slovenia brand will be designed, and a particular product line will be manufactured based on the umbrella (overarching) strategic topics.

The promotional products will support:

- the umbrella (overarching) story of green, active, and healthy Slovenia,
- the annual umbrella strategic topic (culture),
- innovative tourist products,
- other products, digital marketing activities (prize competitions), etc.

The distribution of promotional products:

- upgrading products through creative solutions,
- increasing the range and attractiveness of products.

4.4.4 Research, development, innovation, and European projects

The mission of the Research, Development, Innovation, and EU Projects Department is to devise strategic policies in the field of marketing, promote the sustainable development of the Slovenian tourist offer, and provide information supporting the decision for more competitiveness in tourism. In 2018 and 2019, we are continuing our development of the Green Scheme of Slovenian Tourism as the central tool for achieving the vision: 100% green Slovenia.

4.4.4.1 Development

1. The sustainable development of Slovenian tourism

The key activities within the promotion of the sustainable development of tourism are:

1. Managing the Green Scheme of Slovenian Tourism;
2. The development of the Green Scheme of Slovenian Tourism by including 10 new destinations per year and expanding it to nature parks, travel agencies, and other groups of partners;
3. Cooperation in projects focusing on the sustainable development of Slovenian tourism;
4. The support for promotion departments in preparing content in the field of sustainable tourism and the Green Scheme of Slovenian Tourism.

GREEN SCHEME OF SLOVENIAN TOURISM

In 2015, within the national and certification programme Green Scheme of Slovenian Tourism, the Slovenian Tourist Board carried out the first pilot invitation to destinations to become included in the programme for sustainability assessment according to the Green Destinations Standard. The procedure for obtaining the Slovenia Green Destination label was successfully completed by 9 destinations. At the same time, 6 accommodation providers who obtained the Slovenia Green Accommodation label on the basis of one of the six international environmental labels verified by the Scheme also joined the Scheme. In 2017, the STB carried out the third consecutive invitation to destinations, and the Scheme was upgraded with parks; two travel agencies also joined. Thus far (July 2017), the national scheme includes: 22 destinations with the Slovenia Green Destination label, 13 accommodation providers with the Slovenia Green Accommodation label, 3 parks with the Slovenia Green Park label, and 2 agencies with the Slovenia Green Travel Agency label. The STB received the National Geographic World Legacy Award in the category Destination Leadership for its sustainable efforts, and in 2016 it received an award for being the first green country in the world according to the Green Destinations Standard.

2. Development of tourist products

Pursuant to the mission of the STB and the enhanced role of products, as defined by the Strategy for the Sustainable Growth of Slovenian Tourism (Ministry of Economic Development and Technology, 2017), the key activities of the STB are:

1. Promoting the development of the ten primary tourist products;
2. Drafting comprehensive guidelines for the development of selected primary tourist products;
3. Towns, Cities, and Culture as the two-year topic in 2018 and 2019
4. Active getaway (Outdoor) – integrating products within the segment and cooperation in projects;
5. Promoting the development of secondary and niche tourist products;
6. Support to the development of cuisine – product development activities and promoting cuisine under the Taste Slovenia brand by enhancing vertical integration with regional/local culinary brands;
7. Enhancing the marketing competitiveness of central products (Health and Wellness, Outdoor, MICE);
8. Establishing a national touring system that takes advantage of Slovenia's special features as a country located where the Alps, the Mediterranean, and the Pannonian Plains meet.

CULTURE AS THE CENTRAL TOPIC IN 2018 AND 2019

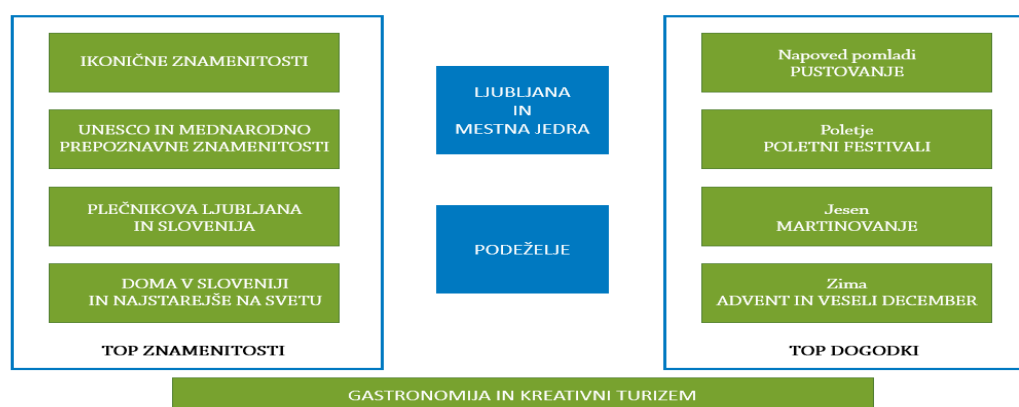
The STB defined culture as the central topic of Slovenian tourism in 2018 and 2019, and for this purpose it drafted the Operational Marketing Plan for Cultural Tourism in Slovenia (hereinafter: ONKULT), which contains the definition of key advantages of Slovenia's cultural tourism offer with regard to value and promotion.

The vision: "by 2020, Slovenia will be recognisable as a cultural tourism destination for guests who come with primary and secondary culture motives" are supported by the two basic strategic goals of the ONKULT: 1) to position Slovenia in the market as a destination for cultural tourism with an attractive, diverse, and high-quality cultural offer; and 2) by promoting the product Towns, Cities, and Culture, to contribute to the increase in the number of tourists and their overnight stays and the extension of the average length of stay. The key advantages of Slovenia's cultural tourism offerings are seen in the exceptional cultural and natural diversity, as Slovenia has been a cultural crossroads of nations and regions, a treasure trove of influences and findings,

it is seen in the icons of Slovenian tourism and historical towns and cities, world-class culture, art, events taking place year round, and in countryside tourism.

The matrix of the most attractive elements of products combines the main attributes of Slovenia's cultural tourism offer; it was devised on the basis of analysing secondary sources, workshops, in-depth interviews, and surveys. Its core are Ljubljana, town centres, and the countryside; the matrix also consists of top attractions and top events.

Chart 10: The matrix of the most attractive elements of cultural tourism



SL	EN
IKONIČNE ZNAMENITOSTI	ICONIC ATTRACTIONS
UNESCO IN MEDNARODNO PREPOZNAVNE ZNAMENITOSTI	UNESCO HERITAGE AND INTERNATIONALLY RECOGNISED ATTRACTIONS
PLEČNIKOVA LJUBLJANA IN SLOVENIJA	PLEČNIK'S LJUBLJANA AND SLOVENIA
DOMA V SLOVENIJI IN NAJSTAREJŠE NA SVETU	AT HOME IN SLOVENIA AND THE OLDEST IN THE WORLD
TOP ZNAMENITOSTI	TOP ATTRACTIONS
LJUBLJANA IN MESTNA JEDRA	LJUBLJANA AND CITY CENTRES
PODEŽELJE	COUNTRYSIDE
Napoved pomladi PUSTOVANJE	Announcing spring SHROVETIDE CARNIVAL
Poletje POLETNI FESTIVALI	Summer SUMMER FESTIVALS
Jesen MARTINOVANJE	Autumn ST MARTIN'S DAY CELEBRATION
Zima ADVENT IN VESELI DECEMBER	Winter ADVENT AND MERRY DECEMBER
TOP DOGODKI	TOP EVENTS
GASTRONOMIJA IN KREATIVNI TURIZEM	GASTRONOMY AND CREATIVE TOURISM

A selection of the elements of the cultural offer in eight cultural areas has been prepared for each macro destination:

1. cultural and historical heritage,
2. museums, galleries, memorial houses, historical or art collections,
3. cultural institutions and programme providers with continued offer of artistic and entertainment programmes,
4. festivals, traditional events and shows,
5. cultural trails,
6. organised tours,
7. creative experiences, demonstrations, and workshops,
8. cultural landscape.

The document also includes marketing cultural routes which round off the cultural and tourist offer of macro regions in terms of content and promotion.

The name of the cultural tourism product is **SLOVENIA CULTURE**, and the product slogan for the promotion during the two-year topic is **IT'S SLOVENIA CULTURE TIME**, which can be applied to individual elements of the matrix (**IT'S LJUBLJANA TIME**, **IT'S FESTIVAL TIME**, etc.). The document includes the cover story and sub-stories with sub-slogans and cultural and tourist products.

During the two-year topic, culture or the creative concept will be implemented in the STB's individual tools and highlighted in the following areas: website, social media, newsletters, press releases, video and photo content, study tours, editorial calendar, promotional articles, the umbrella catalogue, convention and workshop appearances, and the development of cultural tourism.

4.4.4.2 Research

We wish to offer added value to the stakeholders of Slovenian tourism by continuing to enhance market research and providing them with relevant professional information allowing them to make high-quality business decisions that are supported by information.

This includes:

- carrying out studies in target markets (and not just among visitors) as a basis for planning marketing activities,
- defining in detail the needs for key data and information necessary for making decisions (at every level or the marketing management process),
- structuring data sources and the necessary studies in the most effective manner.

1) Research:

- Researching target markets for Slovenian tourism in connection with segmentation (market structure and potential, familiarity with Slovenia and its perception, competitively positioning Slovenia, intention behind visits);
- Measuring the effectiveness of events organised by the STB by carrying out satisfaction surveys;
- Specific ad hoc studies related to actual needs and developments.

2) Analytics and reports:

- Analysing and publishing monthly results on tourism turnover in Slovenia;
- Drafting the annual publication Slovenian Tourism in Numbers;
- Annual publication of brief market overviews for all target markets (the analysis of tourism turnover by country);
- Specific ad hoc analyses related to actual needs and developments;
- The publication of data and analyses on the website for Slovenian tourism and on social media.

3) Cooperation with professional institutions for data collection and processing:

- Cooperating with the Statistical Office of Slovenia (SURS) with regard to the methodology and implementation of the Survey on Foreign Tourists and the Survey on Foreign Passengers in order to better monitor tourism performance (tourism turnover, receipts from the export of travel).

4) Membership of the European Travel Commission Market Intelligence Group (ETC MIG):

- Cooperation in devising a plan for market research of markets that are not ETC members (non-European markets and some European markets);
- Cooperation in the ETC NTO Budget Survey – annual comparative study related to the organisation of national tourist boards (the amount and structure of the budget, competencies and responsibilities, number of employees, number of representative offices, target markets, etc.);
- Data input related to Slovenia's tourism turnover in the Tourmis website with the purpose of allowing comparisons between ETC member states;
- Access to the ETC library (monitoring the changes in tourism supply and demand and in the operation of the tourism industry at the international and national level – monitoring ETC, UNWTO, WTTC studies, etc.).

The plan for carrying out market research and analyses in 2018 and 2019

ACTIVITY	NUMBER	LANGUAGE	FREQUENCY	RESOURCES
Target market research	5–7	SLO	annually	EUR 70,000
Brief marker overviews	35	SLO, ENG	annually (temporary annual data, updated with final annual data)	internal resources
Tourism in numbers	1	SLO, ENG	Annually (final annual data)	internal resources
Monthly turnover analysis	24	SLO, ENG	Twice a month (temporary and final monthly data)	internal resources
Measuring satisfaction with STB events	3	SLO	annually	EUR 4,000

SEGMENTATION – IDENTIFYING TARGET GROUPS OF SLOVENIAN TOURISM (BUYING PERSONAS)

When determining segments and forming personas of Slovenian tourism, **three key motives in tourism served as our basis: experience, socialising, peace/care for oneself**. The motives of individual personas can be mutually intertwined, some are more, some less expressed. On the basis of the prevailing motive, the personas have been divided into three segment groups:

1. **EXPERIENCE** (group type: **explorers**): adventurers, green explorers, active families, urban conscious;
2. **SOCIALISING** (group type: **social butterflies**): devoted mothers, active nostalgists, care-free youth, urban consumers, social foodies;
3. **CARE FOR ONESELF** (group type: **muses**): beauty and indulgence lovers, the forever young, relaxed escapists.

Based on the personas, the Slovenian Tourist Board will devise a strategy of (segmented) digital content marketing, which will also be reflected on the new website for Slovenian tourism, and the personas can also serve as the basis for the future development of the segmented offer and marketing for the providers and destinations within the Slovenian tourist industry. They represent a connecting element between the Slovenian Tourist Board and the tourist industry in

the search for a “product-market fit” and in discovering opportunities for existing and new products.

4.4.4.3 Innovativeness

Encouraging innovativeness:

- Calling for applications in the Snovalec and Sejalec projects.

Editing the content of the platform for innovation:

- Calling for applications and providing information.

4.4.4.4 European projects

Monitoring and supporting European projects:

- Cooperating on projects;
- Publishing current European and Slovenian calls for applications on a weekly basis.

EDEN:

- Carrying out the final project activities;
- EDEN SLOVENIA 2016–2017 (the selection of a new destination with the topic of cultural tourism in 2017) and the potential application to the new call for applications related to the EDEN 2018 promotional project.

4.4.4.5 Annual business meetings

Bled Strategic Forum:

- Implementing the content aspect of the tourism discussion panel at the Bled Strategic Forum in cooperation with the Tourism and Internationalisation Directorate and the Ministry of Foreign Affairs.

Days of Slovenian Tourism:

- Implementing the content aspect of the Days of Slovenian tourism and the Slovenian Tourism Forum.

4.4.4.6 Other projects

In cooperation with key partners in Slovenian tourism, the STB will promote strategic projects that contribute to the development and the raising of the awareness of the tourist offer among the selected target segments of the public in Slovenia.

4.4.4.7 Strategic projects

These projects include cooperation related to the development and marketing of convention tourism carried out by the Slovenian Convention Bureau (KUS) and promoting the development of convention tourism offerings in Slovenia.

4.4.5 Marketing management model (macro destination model)

The basic definitions for each macro destination are presented in greater detail in Chapter 3.2.

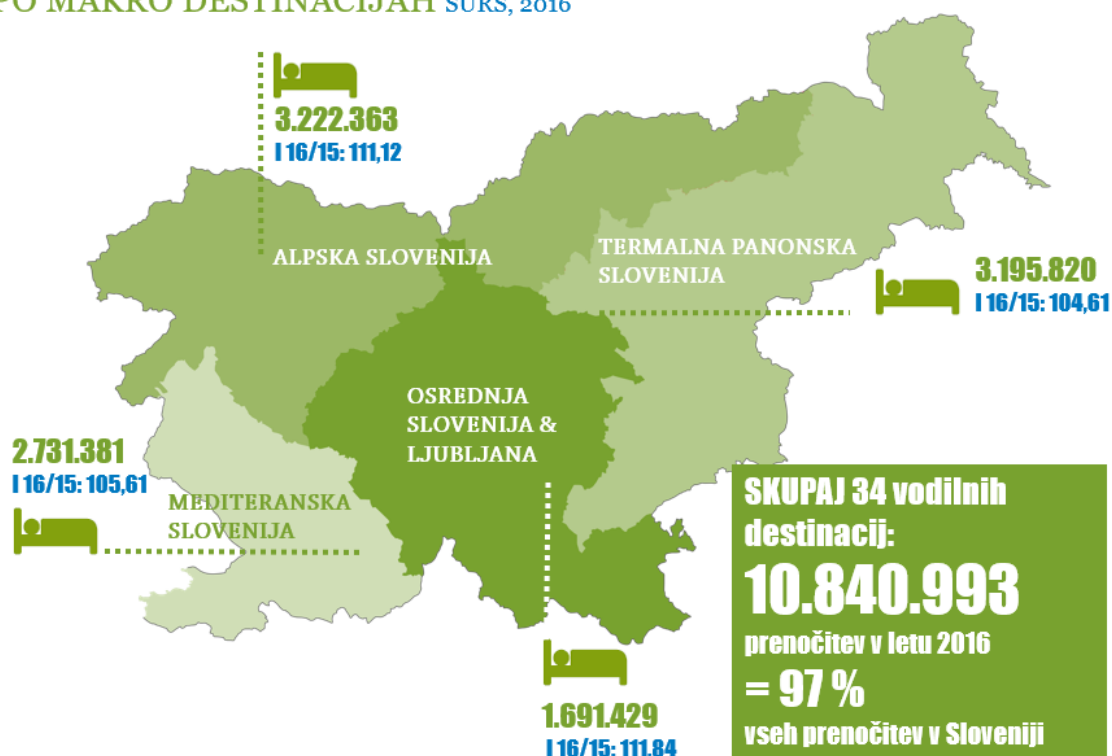
The macro destination model becomes a very important platform within STB operations, with the purpose of:

1. More effective communication and promotion at the umbrella level of Slovenian tourism;
2. Enhancing vertical integrations from the umbrella level to the destination level;
3. Enhanced development and education work with destinations in order to promote product development and competitiveness.

The basis for the model is the definition of the partners at the local level (these partners are DMMO's that manage destinations defined in the model as leading destinations). **The defined leading destinations (34 in total) generate 10,840,993 overnight stays (data of the Statistical Office of Slovenia for 2016), which accounts for 97% of all overnight stays in Slovenia.** This makes the model very representative (it does not only cover several strong destinations, but practically all generators of overnight stays) – practice abroad has shown that the recommendable proportion of leading destinations is 80%.

Chart 9: The amount of overnight stays in leading destinations, by macro destination, showing the growth in overnight stays

PRENOČITVE VODILNIH DESTINACIJ PO MAKRO DESTINACIJAH SURS, 2016



SL	EN
PRENOČITVE VODILNIH DESTINACIJ PO MAKRO DESTINACIJAH	OVERNIGHT STAYS IN LEADING DESTINATIONS BY MACRO DESTINATION
SURS, 2016	SURS, 2016
ALPSKA SLOVENIJA	ALPINE SLOVENIA
MEDITERANSKA SLOVENIJA	MEDITERRANEAN SLOVENIA
OSREDNJA SLOVENIJA & LJUBLJANA	CENTRAL SLOVENIA & LJUBLJANA
TERMALNA PANONSKA SLOVENIJA	THERMAL PANNONIAN SLOVENIA
SKUPAJ 34 vodilnih destinacij:	IN TOTAL, 34 leading destinations:
10.840.993 prenočitev v letu 2016	10,840,993 overnight stays in 2016
= 97% vseh prenočitev v Sloveniji	= 97% of all overnight stays in Slovenia

FIRSTLY: Macro destinations for a more effective communication and promotion at the umbrella level of Slovenian tourism.

- The basic purposes of macro destinations are a more effective promotion and Slovenia's communication in foreign markets in the phase of researching foreign tourists (second phase – see Chart 8).
- We would like to emphasise that, from the perspective of foreign tourists, Slovenia is still considered a single destination for arrivals (and not four separate ones).
- In 2018, the system will be gradually and reasonably implemented in all key promotional tools of the STB (upgraded presentations on the website www.slovenia.info, updated umbrella brochure by including the concept of 4 macro destinations, etc.).

- **Macro destinations are devised as products (experiences) and not as territories – at its core, each of them represents a type of a product, offer, and experience** (at the same time, by defining central products, development and marketing priorities for products are established); to enable a more convenient idea of the space the destinations cover (and secondarily, also to enable the business model of integration), they have also been defined geographically.
- **It is the product aspect that is at the forefront of development and promotional activities (the definition of priority products for selected target segments by individual target market).** With regard to products, close and constant cooperation with product associations takes place (the STB forms partnerships with drivers that are significant at the national level or the macro destination level and with destinations).

Chart 8: Significance of levels depending on the phase of a tourist's path to purchase



SL	EN
1. faza SANJARJENJE	Phase 1 DAY-DREAMING
2. faza RAZISKOVANJE	Phase 2 EXPLORING
3. faza REZERVACIJA	Phase 3 RESERVATION
4. faza IZKUŠNJA	Phase 4 EXPERIENCE
5. faza DELJENJE	Phase 5 SHARING
SLOVENIJA	SLOVENIA
(Slovenija je 1 destinacija)	(Slovenia is a single destination)
VODILNE DESTINACIJE	LEADING DESTINATIONS

= Tiste, ki so najpomembnejše z vidika imidža, prepoznavnosti znamke in obsega nočitev ZA BOLJ JASNO IN OSREDOROČENO KOMUNIKACIJO	= Those that are the most important from the perspective of the image, recognisability of a brand and the amount of overnight stays FOR A CLEARER AND MORE FOCUSED COMMUNICATION
MAKRO DESTINACIJE, tudi kot vstopne točke v širšo destinacijo	MACRO DESTINATIONS, also as entry points to the broader destination
= Ko turist raziskuje in želi več informacij, mu makroregije pomagajo pri razumevanju, kaj ponuja Slovenija (produktno in geografsko)	= When a tourist explores and seeks more information, macro regions help them understand what Slovenia has to offer (from a product and a geographic perspective)
PONUĐNIKI	TOURIST PROVIDERS
Izbrana destinacija (VODILNE & DRUGE DESTINACIJE)	Selected destination (LEADING AND OTHER DESTINATIONS)
ŠIRŠA DESTINACIJA (REGIJA)	BROADER DESTINATION (REGION)
DESTINACIJE	DESTINATIONS
DESTINACIJA PRIHODA	DESTINATION OF ARRIVAL
ŠIRŠA DESTINACIJA (REGIJA)	BROADER DESTINATION (REGION)
= Ko je turist na destinaciji, mu predstavimo širšo »zgodbo« (regijo)	= When a tourist is at a destination, they are presented with the broader "story" (region)
V OSPREDJU KONKRETNE IZKUŠNJE, DOŽIVETJA na destinaciji, v Sloveniji	SPECIFIC EXPERIENCES, ADVENTURES at the destination, in Slovenia, are AT THE FOREFRONT
Izkušnjo upravlja destinacija	An experience is managed by the destination
Model je pripravljen za TUJE TRGE (ciljni trgi slovenskega turizma)	The model is prepared for FOREIGN MARKETS (the target markets of Slovenian tourism)

SECONDLY: Macro destinations as the basis for enhancing vertical integrations from the umbrella level to the destination level.

- The macro destination level is clearly and operationally classified in the STB's organisational and communications model, and it serves as the platform for enhancing integrations to destinations.
- In 2017, the STB began establishing a system for marketing, product, and promotional coordination of macro destinations; these destinations may also be formally organised (from medium- to long-term), depending on the interests of the partners and on whether it makes sense from a marketing perspective.
- The coordination takes place from the STB to the defined drivers/partners in each leading destination²⁷ (each leading destination has one partner that operates as a DMMO), by actively including and cooperating with product associations.

²⁷ The obligations of leading destinations with which the STB will sign a partnership agreement on cooperation in the autumn of 2017 are:

- signing of a destination partnership agreement with the STB (for a 2-year period; related to the STB Work Programme),
- active participation at coordination meetings (in the first phase, coordination by the STB),

- The basis for the concept of the work are joint occasional work meetings in each macro destination.

THIRDLY: Enhanced development and education work with destinations in order to promote product development and competitiveness.

Macro destinations also serve as the basis for product development work (establishment of a Development Academy at the STB and the pillar Tourism Development at the Ministry of Economic Development and Technology). The activities that will be carried out within the macro destination model are development and educational activities in the following areas: product development, improving product competitiveness (quality), destination strategic management, management of visitor experience at a destination, central capacities at a destination, etc. Content will be specifically defined in cooperation with partners, on the basis of their needs and highlighted challenges. The process will be long term and it will be carried out as a group process (joint educational content) enjoying active support (coaching).

4.4.6 The concept for communication-related and creative solutions supporting the I feel Slovenia brand

Activities for the enhancement of the I feel Slovenia brand will be carried out in two areas:

1) The regulation of the I Feel Slovenia brand architecture and the production of a new communications platform

This activity includes: 1) regulating the I feel Slovenia brand architecture from the umbrella level to the macro destination level and product level, 2) defining and implementing a communications platform that will operate in the long term (approximately five years), define creative solutions (visual and verbal, for all tools – online and offline, at the umbrella level and in each macro

-
- drafting strategic policies for macro destinations together with the STB and cooperating on the STB Work Programme,
 - cooperation with regard to regular activities (inclusion in the STB's regular tools) and additional activities (additional campaigns for macro destinations – partnership activities) – confirming the key for financing partnership activities,
 - preparing content (stories, experiences, photos, video, etc.),
 - cooperating in development/educational activities,
 - using the I feel Slovenia brand in accordance with the adopted brand architecture and content-related guidelines,
 - integrating and including other destinations and experiences,
 - active cooperation and work related to development activities,
 - mode of operation: responsiveness, transparency (regularly updated destination profile/ID: statistics, products, segments, activities, financial plans for DMOs, etc.)

destination, and especially for each product), and enable improvements of the operational implementation of marketing communication.

The emphasis is on (1) reducing various communication levels, (2) the communication support for the new vision for Slovenian tourism, and (3) on the defined identity of the I feel Slovenia brand. New communications slogans will communicate more experientially and, at the same time, will represent a “call to action” (a shift from a functional promise, through an emotional to an experiential promise, and a greater inclusion of target groups).

The approach for devising a communications platform encompasses 4 steps:

- **STEP 1:** Carrying out market research to assess the current perception and advantage of a destination in selected primary markets.
- **STEP 2:** Drafting a communications brief that will: clearly define the identity and the basic message of the brand of Slovenian tourism and support new marketing positioning; build on the character, scenarios, and leading motives of the four macro destinations and the defined central tourist products; and determine the expectations and guidelines for creative agencies.
- **STEP 3:** Carrying out an international call for applications for the selection of an internationally competitive agency providing branding and a creative communications solution.
- **STEP 4:** Implementing the proposed solution in all communications and promotional tools (gradually, in 2018 and 2019).

2) Enhancing the I feel Slovenia brand at the intersectoral level and the destination level

By means of the intersectoral integration among stakeholders that use the I feel Slovenia brand (which has been intensified in 2016/2017 under the leadership of the Communication Office of the Government of the Republic of Slovenia which manages the brand at the national level), the STB has been actively involved in intersectoral integration (tourism, sport, culture, science, the economy).

Furthermore, by means of the guidelines devised for the use of the brand at the destination level, we are also enhancing the correct and more active use of the I feel Slovenia brand at the destination level (including the I feel Slovenia brand and its use pursuant to the provided guidelines and tools) as one of the conditions for the status of a leading destination.

Chart 11: Starting points for establishing and actively managing brand architecture

1. KROVNA RAVEN

Razvoj in implementacija kreativne platforme, ki komunicira zeleno, aktivno, zdravo Slovenijo



2. MAKROREGIJSKA & PRODUKTNJA RAVEN

Vzpostavljamo indosirane clustrske in produktne znamke

4 MAKROREGIJE



NOSILNI PRODUKTI (primeri)



3. DESTINACIJSKA RAVEN

Tu krepimo dosledno in pravilno uporabo znamke I feel Slovenia



SL	EN
1. KROVNA RAVEN	1. UMBRELLA LEVEL
Razvoj in implementacija kreativne platforme, ki komunicira zeleno, aktivno zdravo Slovenijo	The development and implementation of a creative platform that communicates the green, active, and healthy Slovenia
2. MAKROREGIJSKA & PRODUKTNJA RAVEN	2. MACRO REGIONAL AND PRODUCT LEVEL
Vzpostavljamo indosirane clustrske in produktne znamke	We establish endorsed cluster and product brands
3. DESTINACIJSKA RAVEN	3. DESTINATION LEVEL
Tu krepimo dosledno in pravilno uporabo znamke I feel Slovenia	Here, the consistent and correct use of the I feel Slovenia brand is enhanced.
4 MAKROREGIJE	4 MACRO REGIONS
NOSILNI PRODUKTI (primeri)	CENTRAL PRODUCTS (examples)

4.4.7 Corporate communications

Corporate communications activities with domestic target segments of the public are carried out with the goal of:

- raising the recognisability and image of tourism as an increasingly important industry,
- improving the reputation of the STB as a key professional and promotional institution dealing with Slovenian tourism,
- increasing the recognisability of the tourist offer and products that are a competitive advantage of Slovenian tourism.

Activities are focused on communicating with the Slovenian tourism industry and other key partners of Slovenian tourism, the media, and the general public.

In 2018 and 2019, the key activities for corporate communications are:

Managing the I feel Slovenia tourist brand (as defined in Chapter 4.9):

- cooperation in the inter-ministerial group for managing the I feel Slovenia brand,
- upgrading and updating the set of products of the official I feel Slovenia marketing company,
- coordinating the marketing communications tool of the STB in accordance with the new position statement,
- updating the visual image of the marketing communications tools of the STB in accordance with the new position statement,
- preparing tools for a more intensive brand implementation in the Slovenian tourist industry and among the partners of Slovenian tourism.

Presentation of key products and policies of Slovenian tourism to experts and the general public:

- cooperation with the central tourism TV show *Na lepše*,
- presentation at the central tourism trade show Natour Alpe Adria.

Communication support for the development and marketing activities of the STB:

- holding press conferences at key STB events,
- carrying out study tours for the representatives of the Slovenian press with the goal of presenting the STB's development projects (culture, api (bee) tourism, boutique tourism, and sustainable tourism),
- forming partnerships with the media,
- preparing weekly TPA (Tourism Press Agency) news for the Slovenian public,
- preparing the expert publication Tourism (Turizem),
- the annual selection of the ambassador of Slovenian tourism.

Communication support for the selected two-year topic of Slovenian tourism and other highlighted topics

- holding press conferences on the topic of Tourism and Culture,
- including the topic in the TPA (Tourism Press Agency) and the Tourism (Turizem) publication,
- carrying out a study tour for the representatives of Slovenian media on the topic of Tourism and Culture.

4.4.8 STB work performance indicators – INTERNAL BUSINESS PROCESS PERSPECTIVE

Strategic objectives	Indicators	manner of calculation: the unit of measure	The base year (2016)	Expected annual result – 2018/2019
RESEARCH, DEVELOPMENT, INNOVATIVENESS, AND EUROPEAN PROJECTS				
P1/1c	Performing analyses – market profiles	Number of performed analyses – market profiles	number of analyses number	7 min 3/3
P1/2c	Performing satisfaction studies (STB, KPJ events)	Number of performed satisfaction studies (STB, KPJ events)	number of studies number	3 min 3/3
P1/3c	Implementation of the Green Scheme	Number of destinations and providers newly included in the Scheme	number of destinations	16 min 5/5

4.4.9 STB work performance indicators – CUSTOMER PERSPECTIVE

Strategic focus: SATISFIED PARTNERS OF SLOVENIAN TOURISM

Strategic objectives	Indicators	manner of calculation: the unit of measure	The base year (2016)	Expected annual result – 2018/2019
S1	Quality of services	Satisfaction score given by the tourism industry with regard to the implementation of the STB Work Programme	from 1/unsatisfied to 5/very satisfied; Source: survey of the Slovenian tourist industry)	3.72 min 3/3
S1/1	Satisfaction with the website	Satisfaction ranking regarding the usefulness of the website Napaka! Sklicna hiperpovezava ni veljavna.	from 1/unsatisfied to 5/very satisfied; Source: survey of the Slovenian tourist industry) Average score	3.66 min 3/3
S1/2	Satisfaction with the effectiveness of events	Satisfaction score related to the effectiveness of	from 1/unsatisfied to 5/very satisfied;	4.01 min 3/3

	(business workshops and conventions)	business workshops and conventions	Source: survey of the Slovenian tourist industry)		
			Average score		
S1/3	Satisfaction with the effectiveness of the organisation of the Days of Slovenian Tourism	Satisfaction score related to the effectiveness of the Days of Slovenian Tourism organised by the STB	from 1/unsatisfied to 5/very satisfied; Source: survey of the Slovenian tourist industry) Average score	3.89	min 3/3
S1/4	Satisfaction with the usefulness of the statistics and the findings of market research	Satisfaction score related to the usefulness of the statistics and the findings of market research	from 1/unsatisfied to 5/very satisfied; Source: survey of the Slovenian tourist industry) Average score	3.87	min 3/3
S2	Carrying out workshops with the Slovenian tourist industry	Achieved number of workshops carried out with the Slovenian tourist industry for the preparation of a two-year work programme	achieved number of workshops number	1	min 1/2
S3	Satisfaction of the line ministry	Fulfilment of the decisions of the agency council	(implemented decisions/adopted decisions)* 100	100%	min 85%/85%

Appendix 1: Statement on the implementation of the multi-year development strategy of the public agency



Kot zakoniti zastopnik Javne agencije Republike Slovenije za trženje in promocijo turizma, Dimičeva 13, 1000 Ljubljana (v nadaljevanju STO), v skladu s 36. členom Zakona o javnih agencijah (Ur.l. RS, št. 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C) podajam

IZJAVO,

da ima STO sprejet dokument »**STRATEGIJO RAZVOJA SLOVENSKE TURISTIČNE ORGANIZACIJE ZA OBDOBJE 2016 – 2020**«, ki v svoji vsebini kot vodilna Institucija za razvoj in trženje slovenskega turizma opredeljuje:

- doprinos k poslovni uspešnosti slovenskega turizma in njegove konkurenčnosti,
- ukrepe za izboljševanje konkurenčnosti gospodarstva nasploh in podobo ter ugled Slovenije kot države,
- zagotavljanje kvalitetnih storitev v odnosu do javnosti in uporabnikov,
- ukrepe za zagotavljanje učinkovite porabe sredstev ter
- ukrepe za zagotavljanje učinkovite kadrovske politike.

Julij 2016

mag. Maja Pak,
direktorica STO

SL	EN
STO SLOVENSKA TURISTIČNA ORGANIZACIJA	STB SLOVENIAN TOURIST BOARD
Kot zakoniti zastopnik Javne agencije Republike Slovenije za trženje in promocijo turizma, Dimičeva 13, 1000 Ljubljana (v nadaljevanju STO), v skladu s 36. členom Zakona o javnih agencijah (Ur. l. RS, št. 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C podajam	As the legal representative of the Public Agency of the Republic of Slovenia for the Marketing and Promotion of Tourism, Dimičeva 13, 1000 Ljubljana (hereinafter: STB), pursuant to Article 36 of the Public Agencies Act (Official Gazette of the Republic of Slovenia [Uradni list RS], No 52/02, 51/04 – EZ-A in 33/11 – ZEKom-C), I hereby issue this
IZJAVO,	STATEMENT
da ima STO sprejet dokument » STRATEGIJO RAZVOJA SLOVENSKE TURISTIČNE ORGANIZACIJE ZA OBDOBJE 2016 – 2020 «, ki v svoji vsebini kot vodilna institucija za razvoj in trženje slovenskega turizma opredeljuje:	declaring that the STB has also adopted the document “ 2016–2020 STRATEGY FOR THE DEVELOPMENT OF THE SLOVENIAN TOURIST BOARD ” which, in its content, as the leading institution for the development and marketing of Slovenian tourism, defines:
- doprinos k poslovni uspešnosti slovenskega turizma in njegove konkurenčnosti,	- the contribution to the business performance of Slovenian tourism and its competitiveness,
- ukrepe za izboljševanje konkurenčnosti gospodarstva nasploh in podobo ter ugled Slovenije kot države,	- the measures for improving the competitiveness of the economy in general and the image and reputation of Slovenia as a country,
- zagotavljanje kvalitetnih storitev v odnosu do javnosti in uporabnikov,	- the provision of high-quality services to the public and users,
- ukrepe za zagotavljanje učinkovite porabe sredstev ter	- the measures for ensuring the effective use of funds, and
- ukrepe za zagotavljanje učinkovite kadrovske politike .	- the measures for ensuring an effective human resource policy.
mag. Maja Pak, direktorica STO	Maja Pak, Director of the Slovenian Tourist Board
Julij 2016	July 2016
Slovenska turistična organizacija	Slovenian Tourist Board
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