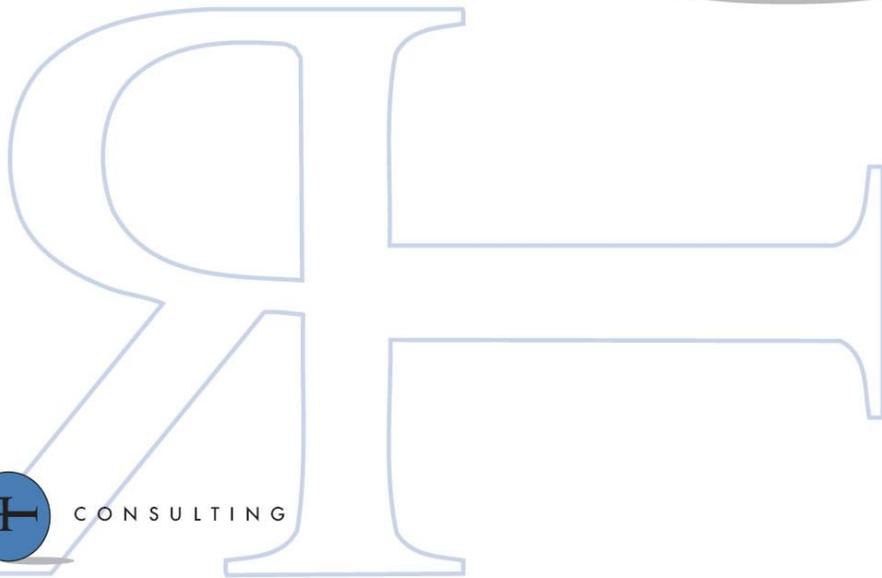


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"Tourism in Slovenia"

di Anton Gosar

“Il turismo in Slovenia”

di Anton Gosar[§]

La giovane Slovenia è, tra i 28 stati membri dell'Unione Europea, tra le destinazioni turistiche geograficamente più variegata.

Su appena 2000 km quadrati i turisti hanno la possibilità di soddisfare molte esigenze e di praticare molte attività: dal mondo alpino al divertimento in spa, dal bassopiano del Danubio al mondo sotterraneo del Carso ed al piacevole Adriatico con sole, mare e spiagge.

Allo stesso tempo questo paese è il crocevia delle quattro principali culture europee: quella Romana, quella Germanica, quella Slava e quella Magiara, che si riflettono nella cultura, nell'architettura, nella lingua e nella cucina slovena. E' dal 1991, anno della caduta della Jugoslavia e dell'indipendenza, che il turismo in Slovenia ha iniziato a piantare le sue radici, poiché considerata in precedenza solo un'area di transito sulla via del Mediterraneo. Pur avendo dovuto compiere enormi passi per conquistarsi una sua identità, anche dal punto di vista turistico, ha raggiunto l'attenzione internazionale nel momento in cui la guida “Slovenia-A Tourist Guide” ha ricevuto il “World's Best Guidebook Award” nel 1995 (Gosar, Jeršič et al., 2009).

In questo articolo approfondiremo le attrazioni naturali presenti, con particolare riferimento alla loro attrattività in termini di visitatori, ma anche di salvaguardia. Le infrastrutture turistiche, d'altro canto, sono relativamente poche nel numero, ma offrono standard qualitativi elevati. In particolare godono di tradizionali, ma allo stesso tempo all'avanguardia, strutture spa. Non bisogna dimenticare certamente i casinò e, in generale, l'offerta per il gioco ed il gioco d'azzardo, come confermato dalla nascita di un casinò ispirato a Las Vegas già nel 1980 a Nova Gorica.

*Per quanto riguarda le presenze turistiche, la Slovenia senza dubbio è un luogo di villeggiatura per i turisti provenienti da stati limitrofi: italiani ed austriaci stanno perdendo di anno in anno però lo status di leader in termini di presenze turistiche in questo paese, mentre tedeschi e inglesi seguono a distanza. Lo sforzo nel raggiungere una propria identità turistica si riflette anche nelle campagne promozionali nazionali: iniziate alla fine degli anni 80 con “Slovenia - on the Sunny Side of the Alps”, sono state seguite da “Slovenia - the Green Piece of Europe” e “Slovenia Invigorates”. La campagna attuale è basata sullo slogan **I Feel SLOVENIA**.*

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“Tourism in Slovenia”

by Anton Gosar

The young nation-state Slovenia is among 28 EU's members the geographically most diverse tourist destination. On just 20.000 sq. kilometers tourists can fulfill their motives related to the mountainous world of the Alps, to the spa amusement at the edge of the Danubian lowlands, to the adrenalin fulfilled experience of the underground world of the Dinaric Karst and to the sun, sea and sand pleasures of the Adriatic Mediterranean. At the same time this country is on cross-roads of 4 major Europe's cultures: the Romance, Germanic, Slavic and Ugro-Finn (Magyar) civilizations, which are being reflected in Slovenia's culture, architecture, language and culinary enjoyment. Since independence and the disintegration of Yugoslavia in 1991, Slovenia tourism industry had to turn to its own roots; in the frame of the previous political unit it was more or less just a transit area to destinations of the Mediterranean. Slovenia has had to struggle with destination identity, but it gained international attention as the guidebook Slovenia – A Tourist Guide received “World's Best Guidebook Award” in 1995 (Gosar, Jeršič et al., 2009).

*The heterogeneity of the landscape, and the diversity of the country in general provide now-a-days an abundance of opportunities for recreational use and tourism. In this article we are at first analyzing natural attractions in relation to the protection and visit. The tourist infrastructure is relatively low in quantity, but offers extreme quality in almost all natural environments. In particular have traditional and new age spa's developed their potentials to the highest levels. One should not oversee the gambling and gaming infrastructure, having had Las Vegas style casino's already in the 1980's (Nova Gorica). Regarding tourists visits, Slovenia is with no doubt the playground for the neighboring countries: Italians and Austrians are yearly changing in the lead position, whereas Germans and British follow in a distance. The struggle with the identity of is most obvious thru promotional slogans: the destination advertised itself in the late 1980's as “Slovenia – on the Sunny Side of the Alps” and was followed by “Slovenia – the Green Piece of Europe” and “Slovenia Invigorates”. The contemporary promotion is based on the sentence and the highlighted capital letters: **I Feel SLOVENia.***

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“Tourism in Slovenia”

by Anton Gosar

1. Natural Attractions

Slovenia is characterized by diverse landscapes in a relatively small geographical area. Mediterranean, Alpine, and Pannonian (Danubian) landscapes, as well as the karstic Dinaric Alps, are located in the nation-state's territory. The natural diversity is enhanced by human modifications, in particular, rural land use and colonization. The heterogeneity of the landscape, and the diversity of the country in general provide, an abundance of opportunities for recreational use and tourism.

The short Mediterranean coast of the Adriatic Sea is an important touristic attraction. In this area, classical coastal tourism has its roots in the beginning of the 20th century and has since shown continuous growth, particularly in the second half of the century. Recently, new amenities and attractions, like casinos, wellness and congress centers as well as cruise tourism have prolonged the traditionally short season. Another inviting touristic landscape relates to the magnificent world of the European South-Easterly Alps where mountain peaks reach close to 3000 meters in height and where deep glacial valleys and glacial lakes offer a variety of summer and winter leisure-related recreational possibilities. Tourism has not developed to such extent in the other Slovenian landscapes. In the Dinaric Alps, the

karstic and speleological attractions are related to the UNESCO heritage site of the Škocjan Caves (Škocjanske jame) and the most visited underground world of the Postojna Cave (Postojnska jama). Amenities and attractions for tourists have been in the Pannonia (Danubian) region traditionally developed in and around thermal and mineral water springs, where the winegrowing hills add additional value to the tourist economy.

The key importance for the development of tourism is the country's geopolitical site in relation to traffic conditions within Europe. Relatively near (less than 500 kilometres) is the “population's axis of Europe” and the cores of economy of the nearby states Austria, Germany, Italy, Croatia, Hungary, and Slovakia. The locality enables visitors to use cars to overcome the distances and to plan, in addition to holidays, short (week-end) leisure-time activities; even one-day excursions to attractive sites are possible. Slovenia's added value is also the fact that Koper's littoral is the closest Mediterranean area for the Central-European landlocked countries; on the other hand, the Slovenian Alps are the closest alpine environment for residents of SE Europe. This fact stands out as a leisure motive of skiers, mountaineers, and other recreationalists interested in the mountainous worlds.

One should also note that Slovenia is criss-crossed by two Pan-European corridors, the E-5 and E-10, which could be regarded as potential opportunity from the viewpoint of touristic mobility and tourism in general. The diverse natural and/or cultural regions in the Republic in Slovenia are not equally attractive and suitable for tourism and open-air recreation purposes. In general, the Sub-Mediterranean region and the region of South-Eastern Alps are more suitable for tourism development than others. This should not say

that other areas, limited in size and character, could not be equally attractive.

1.1 Protection of Nature

From the viewpoint of tourism and open-air recreation, another important element, namely numerous protected areas of nature and culture, should be named. According to the IUCN (International Union for Conservation of Nature) categorization, 12.6% of the nation-states’ territory is under different protection status.

Tab. 1. - Large Protected Areas, 2012

Name of Protected Area	Area size (ha)	Major Settlements	Beds in 2012	Characteristic Features	Prevailing Forms of Tourism
Kozjanski park	20,760	Podčetrtek, Kozje, Bistrica ob Sotli, Krško, Brežice	7,199	Countryside, Wellness	Rural tourism, Spas (Health Tourism)
Landscape park Goričko	46,268	Grad, Moravske Toplice,	3,940	Countryside, Wellness	Rural tourism, Spas (Health Tourism)
Landscape park “Sečoveljske soline”	721	Piran-Pirano, Portorož-Portorose	15,040	Sun-Bathing, Salt Ponds	Nature Tourism, Wellness
Park Škocjanske jame (Škocjan Caves)	401	Divača, Lipica	276	Cave, Heritage, Stud Farm	Speleological tourism, Lipizzaner Horses
Triglavski narodni park (Triglav National Park)	83,982	Bovec, Kranjska Gora, Bled, Bohinj, Kobarid	27,210	Mountains, Lakes, Woods	Summer and Winter Recreation, WW Memorial

Source: ARSO - Slovenian Environment Agency (data on protected areas). SURS - Statistical Office of the Republic of Slovenia (data on tourist beds).

According to the recent list of protected areas (ARSO - Slovenian Environment Agency 1, 2011), Slovenia has 1 National Park (Triglav National Park), 3 Regional Parks, 43 landscape

parks, 1 strict nature reserve, 54 nature reserves and 1162 natura monuments.

The actual importance of protected sites for tourism and open-air recreation is based on several factors and is different from case to

case. Some are extremely popular and are heavily visited; others are less known and receive just regional visitors. There is limited information regarding visits since entrance into most of these sites is free of charge; the exceptions are rare: Landscape Park Sečoveljske soline; Park Cave of Škocjan; Landscape Park Logarska dolina. Management of protected areas is organized just in about 10 cases.

A large number of protected areas are located in regions where tourist visits are extreme and have a long tradition in tourism. Therefore, seasonal and daily visits of protected areas are generally very high. Nearby urban centers and metropolitan areas contribute to visits on week-ends. Most visitors experience, according to the limited data base, natural attractions in such areas. Postojnska jama – the internationally well-known Cave of Postojna – leads. About 20 years ago it received an average of 1 million visitors annually; now this number has fallen due to geopolitical reasons. However, visits to the cave are still twice the number of any other registered sites to be visited.

Visits of selected sights are generally not related solely to the sights' potential tourist attraction (experience potential); instead, it is predominantly due to locality. Therefore, natural and cultural attractions close to metropolitan areas and along major

highway routes are visited much more intensively than those in periphery.

Tab. 2 - *Most Visited Tourist Attractions in Slovenia, 2012*

Touristic Sight	No. of Visitors in 2012
Cave of Postojna	548,424
Bled Castle and Museum	221,230
Zoo of Ljubljana	214,239
Ljubljana Castle	122,753
Predjama Castle	115,079
Škocjan Caves	100,299
Stud Farm Lipica	95,730
Savica Waterfall, Bohinj	80,077
Vintgar Gorge, Bled	76,916
Celje Castle	65,700
Ptuj Museum	64,865
Kobarid Museum	63,904
Savinjski gaj Park, Mozirje	52,000
Town Museum Škofja Loka	50,500

Source: SURS – Statistical Office of the Republic of Slovenia.

The most visited historical and cultural attraction is the Bled Castle Museum, situated just above the town, alpine lake and island of Bled, one of the most visited and internationally best known tourist localities. The nearby Vintgar gorge (river Radovna) registers high number of visitors because its proximity to the named attraction as well. The main east-west/north-south highway axis passes just few kilometers away from the other two well-visited attractions: the Cave of Postojna and the Stud farm of Lipica.

2. General Tourism Preconditions

Compared to Slovenia’s natural wonders, Slovenia’s cultural heritage and related attraction has shown less potential in the eyes of tourists. This clearly puts natural heritage in the forefront of attractions of the young nation-state. Slovenia has, according to the Registry of Cultural Heritage (Registry of Cultural Heritage, 2011), 28,833 registered cultural heritage units, being classified into the following categories: 28,423 static cultural heritage units, 12 mobile cultural heritage units (example: Ljubljana’s Tram #46) and 398 units of the integral heritage (example: Ankaran’s Cyprus Tree Vista). Museums are by domestic and foreign tourists most visited institutions of culture. In most museums domestic visitors prevail. Students of different age and study orientation make up to 40% of all visitors (Evalvacija slovenskih..., 2010). This speaks of a very limited role of Slovenian museums and galleries in the overall performance of tourism in Slovenia.

One notices again that museums and galleries, being located close to an attractive and/or on to traffic preferred location, are the predominant centers of visit. In general, castles don’t play an important role heritage-wise, but are often visited by tourists due to panoramic vistas, since many of castles and castle towers are built on hills, overlooking the surrounding landscape. Some castles have adapted to contemporary tourism demands (Otočec,

Mokrice), others are hosting museums and galleries (example: City Museum of Škofja Loka, Regional Museum of Ptuj, the already mentioned Bled Castle Museum, ...). It is a pity that several structures of this kind, even in attractive and by tourists well visited regions, fall into decay (example: Castle of Podčetrtek). Tourists are not only interested to visit single structures but show their affiliation to complex urban centers, their parts and interesting architectural structures within. Many Slovenian towns are characterized by their medieval qualities. In particular, medieval cores, such as those found in Ljubljana, Ptuj, Škofja Loka, and Kamnik, are highly attractive and often visited by tourists.

2.1 Tourism Infrastructure

A large portion of the Slovenian tourism amenities, hotels, and other infrastructure, was built in larger, existing tourist resorts in the 1960’s and 1970’s. Beginning in the early 1960’s, tourism gained political support as the Yugoslav communist authorities had to enrich the country’s weakened economy with the hard currency of the West. Similar to Spain, tourism - which was neglected for decades - suddenly experienced an investment boom (Repe, 2006). First, four lane highways were built, communal infrastructure was improved, and the first hotel-skyscrapers were built. Between 1961 and 1971 the number of beds in touristic amenities increased 132% (from

30,039 to 69,819). The number of visitors grew from year to year. Later, the growth of accommodations slowed down but continued to show a steady increase up to the 1990's. Following the announcement of independence in 1991 and the general disintegration of the federal state of Yugoslavia, the number of beds in the tourism sector of the economy was drastically reduced.

Since decline in the early 1990's, the accommodation quantity in Slovenia has consistently grown. Tourist beds exceed 100,000 (in 2010: 117 947¹), which is close to the quantity Slovenia had before Yugoslavia's disintegration. A direct comparison is hard to achieve since statistical registration has changed. Accommodation amenities are mostly in municipalities located in mountainous areas (32.8%), followed by municipalities on the Mediterranean/Adriatic coast (20.4%) and municipalities with mineral and/or thermal water springs (18.5%). The remaining tourist amenities are located in the capital city of Ljubljana and in the transit area between the Alps and the sea. Due to the fact that geographically mountainous and coastline municipalities occupy the western portion of the state, tourism becomes a major economic factor predominantly in the western part of the country. In 2008, three statistical

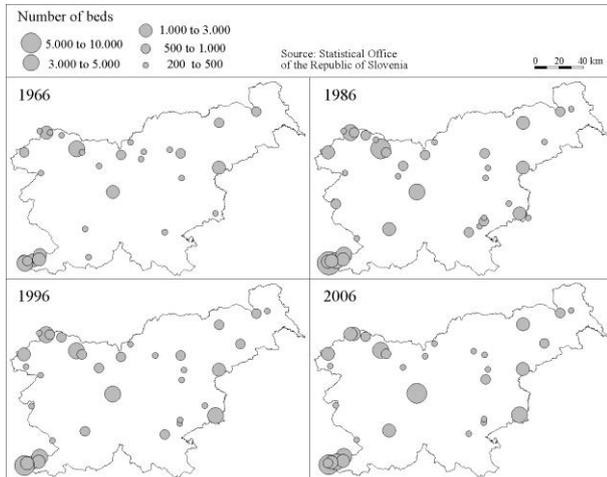
regions (out of 12) along the Italian border registered 51.5% rooms and 54.2% beds for tourists.

According to the latest SURS data an outstanding concentration of touristic amenities is registered in the Slovenian Mediterranean Littoral: the three coastal municipalities of Koper, Izola, and Piran, occupying 1.9% of the nation-state's territory, had 21.669 beds or 23.7% of all in-state beds (91.332) available for visitors in 2009. In addition, regarding tourist amenities, the Adriatic coastal resort of Portorož is leading with close to 8000. The extreme importance of tourism for the local and national economy can be underlined by comparing the available touristic amenities to the space allocated to the municipalities. In Slovenian Istria, about 54,37 beds per square kilometers have been registered in 2009. This number is well above the Slovenian average where this indicator of importance of the tourism economy is closer to 4,5 beds/km². If comparing available touristic amenities with the number of the residential population, the average for Slovenia would be about 4 beds per 100 residents; in the coastal area, that figure is 25 beds per 100 inhabitants. In the second half of the 20th century, the growth of amenities in tourism was linked to changing demands of visitors to Slovenian resorts and regions. As a result of interest in health-related, and in particular wellness-related, commodities, new tourist resorts in the

¹ Source: SURS – Statistical Office of the Republic of Slovenia.

eastern region were developed: Moravske Toplice, Banovci, Podčetrtek, Terme Olimia for example. Despite heavy investments and construction of hotels and other touristic amenities in places with thermal and mineral waters springs, the coastal and alpine regions still remain, due to their cultural and in particular natural attractions, leaders in Slovenian tourism.

Fig 1 - Number of Beds in Slovenian Tourist Resorts, 1966 - 2006



Source: SURS – Statistical Office of the Republic of Slovenia.

Recently, trends in the structure of touristic amenities have changed. In the five year period 2003 – 2008 the number of beds in the tourism sector of the economy has grown for 3%, whereas the growth of the amenities in hotels registered at more than 23%!

Accommodation in other types of touristic amenities has been reduced: in camping facilities - 5.4% and in other types of tourist accommodation amenities with - 7.4%. Five star hotels are definitely the growth leaders (+73%), followed by four star hotels (+39.4%), whereas other type of hotels have a stagnating trend (+4.8%)

Tab. 3 - Tourist Beds According to Type of Accommodation Amenities, 2000 - 2010

Type of Accommodation	2000	2010	2000/2010
All	80,724	83,157	3.0
Hotels	26,618	32,729	23.0
Hotels****	11,522	16,064	39.4
Hotels*****	1,241	2,147	73.0
Camping	16,742	15,846	-5.4
Other Hotels	13,855	14,518	4.8
Other Amenities	37,364	34,582	-7.4

Source: SURS – Statistical Office of the Republic of Slovenia.

2.2 Sports and Recreation

Opportunities for recreation are among the reasons to visit Slovenia. According to the questionnaires distributed to tourists in 2009, almost 26% foreign visitors responded that their main holiday motive was sports and/or recreation (Anketa o tujih turistih..., 2010). One must add that sport facilities and recreation possibilities available are visited and used by local residents as well.

MOUNTAINEERING

Mountaineering and hiking is one of the most popular leisure-time activities among visitors and the residential population. The network of mountain huts and hiking paths has shown a steady growth since the 2nd half of the 19th century. After WWII state's support for alpinism increased, mountaineering as a social phenomenon became popular even in the hilly and lowland regions of the country. The number and length of hiking paths increased and has not changed much since Slovenia's independence. At present 1235 mountain/hiking paths exist and 8.689 km of them are marked accordingly. In addition to the infrastructures, the steep mountain slopes offer several climbing paths which are very popular among alpinists and mountaineers. In relation to the popularity of mountaineering and hiking, a specific accommodation

infrastructure (mountain huts) has enriched the mountainous landscape of Slovenia. According to Statistical office (SURS, 2011), in the summer of 2010, mountain huts provided 6.1% of available tourist beds in the country; in the off-season months, this number is reduced to below 4%.

ALPINE SKIING

Alpine skiing is an important recreational activity. Visitors and the residential population both take part in this open-air activity. Alpine skiing has a long standing tradition in Slovenia (Bloke, 18th century), but ski resorts started to grow predominantly in the second half of the 19th century. Along with major resorts, like Kranjska Gora and Maribor - where international skiing competitions take place annually – a dozen smaller resorts have

Tab. 4- Major Ski Resorts and Skiing Areas in Slovenia, 2012

Ski Resort	Altitude (m)	Capacity (pax/hour)	Skiing Area (ha)
Mariborsko Pohorje	336 – 1347	21,500	220
Kranjska Gora	758 – 1570	18,000	104
Rogla	1069 – 1517	15,000	75
Krvavec	1450 – 1971	13,660	106
Cerkno	938 – 1294	12,993	56,7
Vogel	1309 – 1795	7240	66
Golte	1280 – 1577	5402	60
Kanin-Sella Nevea	1600 – 2300	5370	31
Kobla	543 – 1472	6120	90
Stari vrh	580 – 1216	5840	52,5

Source: Vrtačnik Garbas (2008); www.snezni-telefon.si

become popular on the national and European regional scales.

The biggest density of winter-sport resorts is due to natural conditions (relief intensity, now cover height and length) located in the mountainous area of the Slovenian Alps (SE European Alps).

Inconvenient is the fact that most of the skiing grounds are on relatively low elevations. Slovenia has just one single skiing area located above 2000 meters; most of others are even lower than 1500 meters above the sea level (Mariborsko Pohorje, Cerklno, Stari vrh, ...).

OUTDOOR BATHING

The Environmental Agency has registered 46 outdoor bathing localities: 21 along the sea coast, 8 on lake shores and 17 on banks of rivers (Poročilo Evropski komisiji... 2010).

The highest density where open air swimming/bathing is possible is without doubt in the Mediterranean part of the country. The hindering factors for outdoor bathing/swimming in fresh waters are the

inconvenient summer air and/or water temperatures and the insufficient quality of the river and lake waters. Seven outdoor bathing localities (in 2011) proudly show their Blue Flag for exceptional quality and environmental friendly approaches to recreation.

3. Arrivals of Tourists

Tourism is an important economic activity in Slovenia. According to TTSA – Travel and Tourism Satellite Accounts – the share of tourism within the national BDP was 7.7% in 2003 and 8.5% in 2006 (Zagoršek et al., 2008). At the dawn of the 21st century, several of the nation-state’s geopolitical decisions impacted the growth of the tourism economy: Slovenia became a member of the EU and NATO (2004), introduced the Euro as the national currency (2007), became a full member of the Schengen Space full member (2009) and completed the construction of 330 kilometers of major four-lane highways (2011).

Tab. 5- *Slovenia: Arrivals and Bed-Nights of Tourists, 2000 - 2010*

Year	TOURIST ARRIVALS			BED-NIGHTS		
	Total	Foreign	Domestic t	Total	Foreign	Domestic
2000	1,884,327	1,037,181	847,146	6,508,940	3,276,819	3,232,121
2005	2,327,394	1,514,898	812,496	7,307,667	4,249,817	3,057,850
2010	2,851,020	1,767,481	1,083,539	8,424,741	4,680,456	3,744,285

Source: SURS – Statistical Office of the Republic of Slovenia.

3.1 Origin of tourists

Foreign visitors are traditionally Italians, Austrians, and Germans. To a large extent, residents of other European countries are contributing to the tourism economy of Slovenia as well. Tourists from overseas are rare, but their number has increased since 2010. In particular Russian, Israeli, and Japanese travel agencies offer European experiences - including Slovenia(!) – and/or promote wellness products at Slovenian spas. But measured in relative or absolute numbers, the fact is that, in most Slovenian municipalities, domestic tourists prevail. The share of most loyal visitors has dramatically changed with times. In the 1980's, the Slovenian statistical office registered the most bed-nights by German

tourists (1985: 12.0% of all), followed by Austrians (4.5%) and Italians (4.4%). His proportion remained steady, albeit with fewer Germans, in the mid 1990's: German bed-nights 9.7%, Austrian bed-nights 7.5% and Italian bed-nights 6.6%. The situation in the first decade of the 21st century has changed completely: in 2009 the largest share of bed-nights was made by Italian visitors (11.3%), followed by Austrian (7.4%) and German tourists (6.3%). The number of German visitors shows a constant reverse trend since 1991; Austrian and Italian tourist visits are characterized by a constant growth. One must not oversee the rising importance of the Central, East, and South-East tourist markets.

Tab. 6 - Slovenia: Bed-Nights of Selected Countries, 1985 - 2008

Year	AU	IT	GER	UK	NL	Domestic tourists*	All Foreign visitors	Total
1985	398,060	391,252	1,060,517	547,625	363,284	5,093,620	3,728,765	8,822,385
1990	333,952	713,837	752,338	575,128	336,814	4,283,288	3,673,118	7,956,406
1995	440,749	387,804	571,601	65,762	83,457	3,447,579	2,435,467	5,883,046
2000	526,996	650,566	772,833	152,497	125,210	3,314,901	3,404,097	6,718,998
2005	674,090	855,796	693,371	318,721	190,971	3,173,338	4,399,246	7,572,584
2008	613,765	906,369	585,054	279,437	231,152	3,569,141	4,842,547	8,411,688
1985 (%)	4.5	4.4	12	6.2	4.1	57.7	42.3	100
2008 (%)	7.3	10.8	7	3.3	2.7	42.4	57.6	100

* 1985, 1990 – tourists from the area of former Yugoslavia.

Source: SURS – Statistical Office of the Republic of Slovenia.

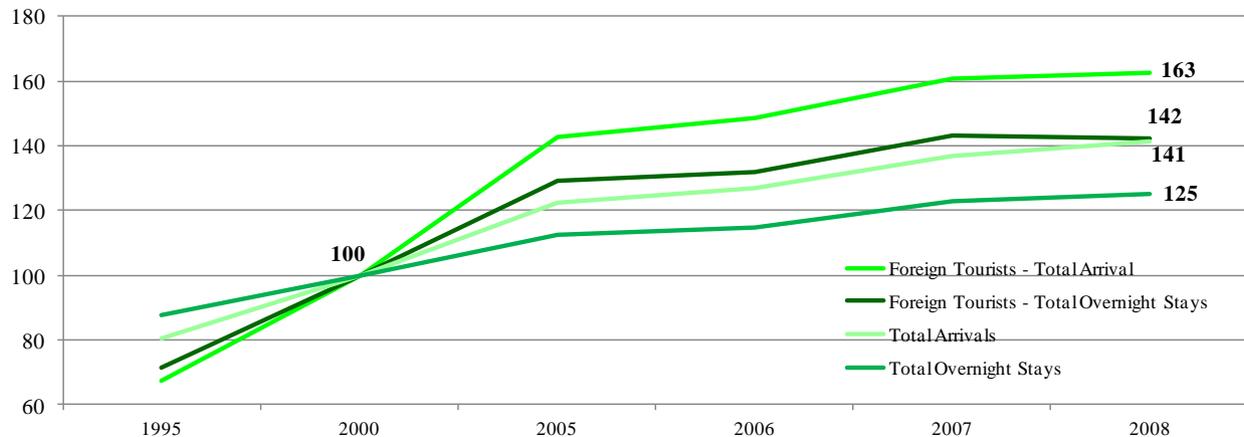
3.2 Seasonality

The predominant seasonality of tourism is one of the characteristic of visits to resorts and areas of touristic importance in Slovenia. Despite other expectations (investments into in-door recreation, introduction of all-seasons tourism products: gaming and gambling, congresses and seminars, ...), this even shows an increasing trend. In the peak season, between June and September, 41.6% registered bed-nights were registered in 2000; nine years later, in 2009, the share of summer

season bed-nights registered climbed to 51.0%. The proportion of visits and bed-nights during the winter season (January – March, December) was below the 25% mark.

In absolute and relative measures, seasonality was almost equal among foreign and domestic tourists in 2000, whereas the share of summer season bed-nights in 2009 was much higher by foreign visitors (53.2%) as the domestic tourists’ summer-season bed-nights fell to 48.1%.

Fig. 2 - Indexed growth of total tourists (arrivals and overnight stays) and foreign tourists (arrivals and overnight stays); 1995, 2000, 2005-2008



Source: SURS – Statistical Office of the Republic of Slovenia.

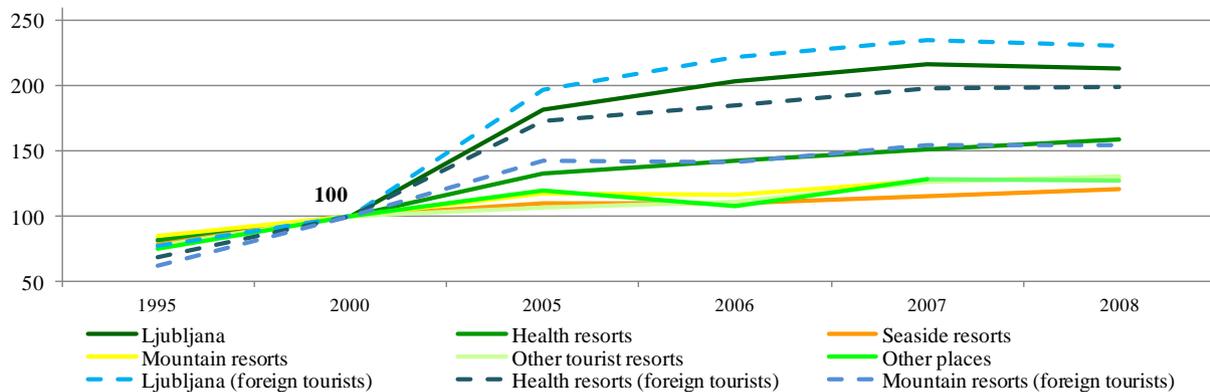
3.3 Regional Distribution

In the part of this paper where accommodation amenities were discussed, the link to the distribution of foreign and domestic tourists was elaborated. Visits of foreign and domestic tourists are concentrated largely in 3 distinguished areas: in the Mediterranean Adriatic littoral, in the area of the Slovenian Alps, and scattered through regions with mineral and thermal water springs. According to named natural features, the lead touristic regions are the “Obalno-kraška statistical region” and the “Gorenjska statistical region”. There is considerable difference in visits of domestic and foreign tourists. Visits of domestic tourists to the Mediterranean coast are followed in quantity by visits to

thermal/mineral baths of Eastern Slovenia; therefore the Savinjska region (and not the alpine Gorenjska region) ranks second in popularity among Slovenian tourists. Considering just bed-nights, the “Obalno-kraška” and “Gorenjska” region are almost even. The reason for this is that, in natural scenes, the Slovenian Mediterranean coast has, in comparison to the nearby extremely long and beautiful Croatian coast of the Adriatic, little to offer. Leading tourist resorts are the most visited places.

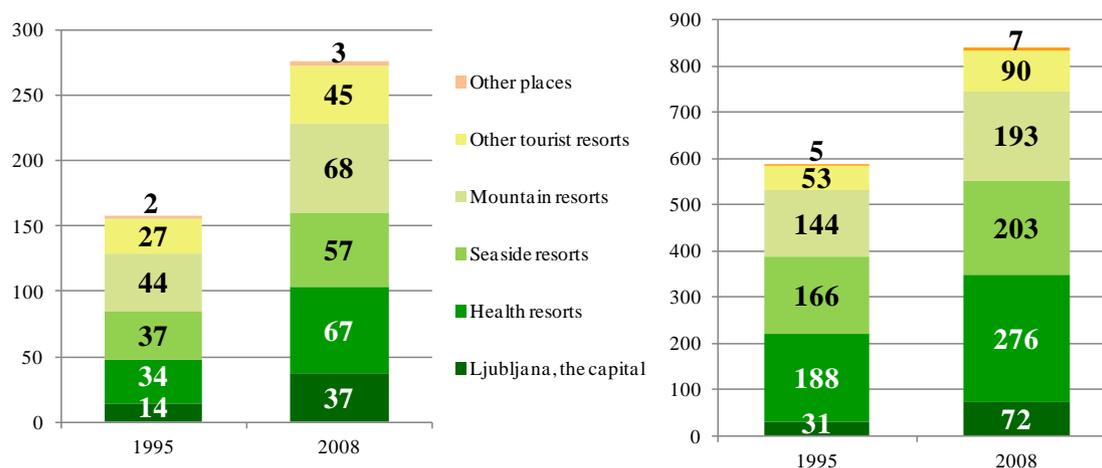
If visits to region and visits to the leading resort of the region are compared, one can note that, throughout the 20th century, visits in the main resorts have prevailed (51% and more).

Fig. 3 - Indexed growth of tourist arrivals per area; 1995, 2000, 2005-2008



Source: SURS – Statistical Office of the Republic of Slovenia.

Fig. 4 Total tourist arrivals 1995 and 2008 per area and total tourist overnight stays 1995 and 2008



Source: SURS – Statistical Office of the Republic of Slovenia. Data are in millions

Looking at the figure 2 we can understand how tourism, since 1995, continue to grow, both in terms of arrivals and overnight stays. What about the areas of attraction, if just tourist visits are taken into account, Ljubljana is, throughout the nation, the leading tourist destination, but also health tourism resorts, in particular for foreign visitors, are interesting. Recently, the second place is shared by Mediterranean Portorož. If just bed-nights are considered, this coastal resort ranks high due to the longer average stays of tourists. The major change in the distribution of tourists took place as the role of health resorts changed due to heavy nation-state investment and because mountain resorts reduced their share

Tab. 7 - Slovenia: Regional Distribution of Tourists and Bed-Nights, 2008

Statistical Region	Tourists	Bed-Nights	Average Length of Stay (Days)
Obalno-kraška	663,671	2,261,156	3.4
Gorenjska	585,256	1,599,633	2.7
Savinjska	341,684	1,376,649	4.0
Pomurska	240,515	885,851	3.7
Osrednjeslovenska	448,352	911,267	2.0
Spodnjeposavska	182,749	648,454	3.5
Goriška	237,463	576,681	2.4
Podravska	200,727	510,660	2.5
Jugovzhodna	98,621	365,396	3.7
Koroška	24,577	78,807	3.2
Notranjsko-kraška	54,036	86,281	1.6
Zasavska	6,062	13,203	2.2

Source: SURS – Statistical Office of the Republic of Slovenia.

within the tourism economy due to lack of visitors from the tourism markets of SE Europe (Yugoslavia). The rise of health resorts since Slovenia's independence is also the result of innovative management.

4. Types of Tourism Motives

4.1 Urban Tourism

Towns are visited for a variety of reasons. Often motives are not related purely to leisure (e.g. conferences, educational seminars, shopping ...). The role of towns as tourism destinations in Slovenia is relatively limited. For example, in 2008, city-municipalities, including Ljubljana, had just 12.8% accommodation amenities (in 2010: 13.7) and 14.4% bed-nights (in 2010: 14.1). The capital, Ljubljana, is an outstanding tourism destination, with 777,247 bed-nights in 2009 (in 2010: 739,450). Therefore, it is always ranked among the top-five tourist destination of the country. Contrary to many other European capitals, visits do not have a long standing tradition and should be considered a function of the recent interest in "discovering" the "New Europe" with its young (20 year old) geopolitical and economic function. Other Slovenian towns are visited, if there are other cultural attractions. This might include, for example, skiing in Maribor, or visits to the Mediterranean littoral tourism in the case of Koper, or gaming and gambling as in the case of Nova Gorica. Other Slovenian city-

municipalities, without similar additional attractions, have registered less than 30,000 bed-nights a year.

4.2 Rural tourism

In the case of Slovenia, we could link rural tourism with a substantial number of tourist sites, including those where motives to visit relate to a specific attraction – like in the case of several spas located in areas we could identify as "typical countryside". Therefore the discussion should be herewith directed to the characteristics of those rural amenities which are linked to the term "tourism on the farm", or – shorter: "farm tourism".

Farm tourism has a long standing tradition in Slovenia. Traces of contemporary farm tourism go back to the 1970's, but this type of tourism has, in relation to accommodation and visits, always lagged behind general growth trends. In recent years, an increase in interest on both the supply and demand sides has become obvious. This is, perhaps, also due to the fact that the only accommodation amenity in rural areas is often farms devoted to hosting guests. Therefore, farm tourism should be valued much higher than the modest numbers of visits and bed-nights show.

The Slovenian statistical office (SURS) published in 2012 data of 303 farms where accommodation is available. According to this source, 4,342 beds there are ready for touristic use. If compared to the national tourism

economy’s figures, farm tourism accounts for a modest 3.68% of accommodation amenities countrywide. The distribution of the named amenities is particularly interesting. Tourism on farms takes place predominantly in (statistically called) “other municipalities” – 54,42%, where touristic accommodations make just 14.64% of the national frame. The presence of farm tourism is stronger in mountainous municipalities (27.59%) and in municipalities with health resorts (10,02%). In other types of municipalities (coastal, town municipalities and Ljubljana), just 7.97% of accommodations on farms can be found. Statistical data proves the steady growth of farms devoted to tourism: in comparison to 2008, the number of farms increased 28% in 2010. Growth has not been registered in Ljubljana and coastal municipalities, whereas municipalities in mountainous environments showed an increase of 39%. Similar growth was registered in “other municipalities” (29%) and in “health-resort municipalities” (21%). Comparison to older data could prove not to be consistent due to the changed methodology of collecting and publishing statistical data. According to the Registry of supplemental activities on farms of the Ministry of Agriculture, Forestry and Food, 371 farms offered accommodation to tourists in 2011. According to this source, 68 more farms are tourism oriented than in the registry of the statistical office. The number of farms,

offering just local food and beverages to visitors is larger.

Tab. 8 - *Tourists visiting Slovenian accommodation amenities, 2008 - 2010*

Type of amenities	2008	2009	2010
All	3,083,713	2,984,828	3,006,272
Farms	27,262	31,574	34,814

Source: SURS – Statistical Office of the Republic of Slovenia.

In 2010, 34,814 tourists used accommodations on farms, accounting for 1.16% of nation-wide tourism arrivals. The fact that farms with accommodation amenities have a share of 3.68% of equal national figures proves that tourist visits to farms are well under the expected average.

According to statistical data, tourism on farms is extremely seasonal. Most of bed-nights, almost 39%, are registered in the two summer holiday months. Seasonality of tourism on farms is much higher than the national average of the seasonality, in which 32.5% of yearly bed-nights are registered in July and August 32.5%. The reason for the extreme farm tourism summer seasonality relates to lower visits in the colder time of the year (October – March).

4.3 Spa tourism

Health tourism has in Slovenia a long standing tradition. The spa Rogaška Slatina became a health-related tourist destination by the 17th century. In the last couple of decades, health

resorts became popular due to an abundance of experiences, among which wellness products have gained the most attention among the older population and the adrenalin rushing water slides among the young urbanites.

In 1970's, the national share of tourist visits to spas was 5.9%, and bed-nights accumulated there were just 14.9% (in 2008: 24.1% and 32.8%). About 40 years later, municipalities where mineral and/or thermal waters are used

register 24.3% tourists and 32.3% of national bed-nights. If just bed-nights are considered spas, are country's leading resorts.

The average length of stay is with 4.0 days, much higher than in other type of resorts (3.0 days). Since the 1990s, the classic thermal baths have changed into modern resorts with several swimming pools, whirlpools, massage springs, rushing rivers, water chutes, and other attractions called "thermal parks" or "thermal rivieras."

Tab. 9 - Slovenia: Bed-nights and Tourist Visits According to Type of Municipality, 2008 -2010

Municipality Type	BED-NIGHTS			TOURISTS		
	2008	2010	%	2008	2010	%
SLOVENIA	9,314,038	8,906,399	100	3,083,713	3,006,272	100
Health Resort Municipalities	3,010,999	2,987,643	33.5	749,348	751,016	25.0
Mountain Municipalities	2,172,899	2,090,410	23.5	775,232	755,367	25.1
Littoral Municipalities	2,155,631	1,981,141	22.2	612,637	559,267	18.6
Ljubljana	777,247	739,453	8.3	391,431	393,010	13.1
Urban Municipalities	565,258	514,457	5.8	267,152	250,432	8.3
Other Municipalities	632,004	593,295	6.7	287,913	297,180	9.9

Source: SURS – Statistical Office of the Republic of Slovenia.

4.4 Winter Sports

Slovenian winter sport resorts are mainly focused on guests preferring alpine skiing. Rare are centers where other leisure-time activities, like Nordic skiing – biathlon (on Pokljuka), ski-jumping (in Planica), cross-country skiing (on Rogla and in Bohinj), sledding and/or ice-skating. Some of winter sport centers – like Mozirje/Golte, Krvavec, Slovenj Gradec/Kope, Mariborsko Pohorje and

Cerkno - register above half of yearly visitors in winter (January, February, March, December). On the other hand, for some well-visited resorts in the core of Slovenian Alps – like Bovec and Bohinjska Bistrica - the winter season is of less importance. Reasons for this can be found in the facts that it is not well suited natural conditions (for alpine skiing, for example) and does not have the winter sport infrastructure.

Recent trends in numerous mountainous areas of the world show an increase of winter season visits and falling numbers of summer hiking and mountaineering visits. Available data for the Slovenian mountainous area support this general trend. In comparison to the other 8 months of the year, share of bed-nights in the winter of 2009 was 28.5%, whereas 20 years ago (in 1989) it was just 24.1%. There are no drastic changes registered, but the importance of the winter season has definitely increased.

4.5 Second Homes

In the second half of the 20th century, the number of second homes (cottages, apartments, shacks, ...) has constantly risen. The analyses of second home location has recently proven that they are constituting an important housing market share in several peripheral and mountainous municipalities – for example along the Croato-Slovenian border in municipalities of Kostel (36.7%) and Podlehnik (28.2%), as well as in the Julian Alps in municipalities of Bohinj (29.1%), Kranjska gora (26.1%) and in Bovec (22,3%). Among second homes (– homes for leisure and recreation) housing units as holiday dwellings (83.2%) prevailed.

The geographic distribution of second homes within the nation-state territory is substantially different from locations of the “real” accommodation facilities in the Slovenian tourism economy. They definitely have their say in outstanding touristic areas – like in the

municipalities of Piran, Kranjska Gora and Bohinj – but second homes are also highly visible features in the rural landscapes, in particular in the Slovenian wine-growing regions. The leading municipality is, with no doubt, the Mediterranean municipality of Piran, being followed by 3 municipalities of the Lower Carniola (Dolenjsko) wine region (cviček) Trebnje, Brežice and Novo mesto where in each close to 1000 second homes are to be found.

5. Tourism Regionalisation

Nation-states, provinces, municipalities, cities, and resorts tend to point out their outstanding features through slogans. Therewith provinces named localities are circling up the tourist region (= destination) being equal or not to the administrative, political designation. Provincial trans-boundary concepts are rare, instead, Central-European nation-states’ cross-border tourism regions seemed to be numerous. But sadly, they remain often just a political torso. Just several positive examples of trans-national tourist destinations, like the “Senza Confini”, the Italo-Austria-Slovene three-border region can be named. Slovenia had, within the former federation, substantial autonomy in politics and economy and had even developed its own policy of promotion. The “tourism destination” of the Socialist Republic of Slovenia was clearly recognizable within the Yugoslav frame. Slogans “We, people are tourists” (“Turizem smo ljudje”) and the one

with an outstanding geographic touch “Slovenia – on the sunny side of the Alps” (“Slovenija - na sončni strani Alp”) set foot in the time of Yugoslavia’s disintegration. Since independence three slogans have characterized the (unknown) “touristic destination”: “Slovenia – the Green Piece of Europe” (1994), “Slovenia Invigorates” (2002) and, finally “I Feel SLOVEnia” (2007).

The first regionalization devoted to/for tourism was written 45 years ago; the next was published about 20 years later. Two have followed. In the 1960s, Slovenia’s territory was first subdivided on principles of evaluating natural and cultural heritage sites for tourism purposes. Several authors (Žagar, 1976; Planina & Mihalič, 1985) have challenged the initial regionalization by Kokole (1965), but not one single author questioned the initial four geographic regions as major “tourist destinations”: the European (south-eastern) Alps, the Pannonian/Danubian flatlands and hills, the karstic ridge of the Dinaric Alps, and the Mediterranean coastal zone. Basic regionalization criteria aimed at attracting tourists was based on natural appearance and character. Physical geography was the lead-segment of regionalization. Slovenia’s independence called for the re-drawing of tourism policies.

The nation-state’s border in the East and South, towards Croatia, suddenly eliminated the once very lively exchange of knowledge, services, products and financial transactions of the tourism sector of the economy. At the

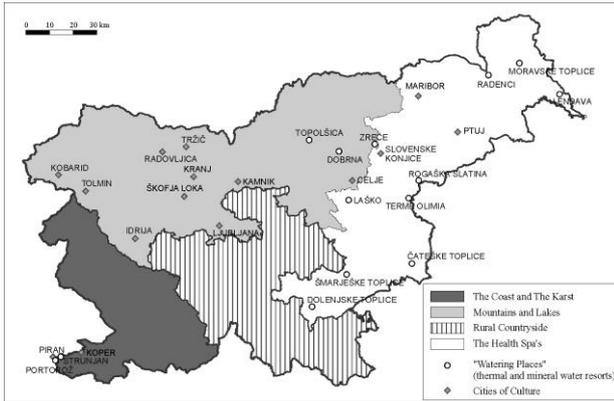
same time, it separated for several years areas, of military confrontation from the peaceful part of Europe (with the exception of the 10 day war – June/July 1991- on Slovenian territory). The geo-political situation initiated the first tourism strategy ever developed for the territory of Slovenia (Sirše et al., 1993; Sirše, 1995). This initial development strategy distinguished between five “tourism subjects”:

1. The Coast and the Karst,
2. The Mountains and Lakes,
3. The Natural Health Resorts,
4. The Rural Countryside,
5. The Historic Towns.

At the dawn of the 21st century, the first move to break the rule of identifying “touristic regions” with the geographic setting was made. The Slovenian Tourist Board (STO) accepted the proposal of Imago Slovenia, a consultant firm, to foresee six promotional segments: Invigorate your Senses, Invigorate your Imagination, Invigorate your Passion, Invigorate your Body, Invigorate your Soul, Invigorate your Drive (STO, 2004).

Geography was moved to the periphery of interest, while the visitor’s motives were put into the foreground of advertisement. Macro-centers of tourism (most often well-known resorts) responsible for the development of a larger tourist region, have been created and even gaming enterprises have had their own share of responsibility for the region of its existence.

Fig. 5 - Slovenia: Tourism Regions According to Tourism Development Strategy

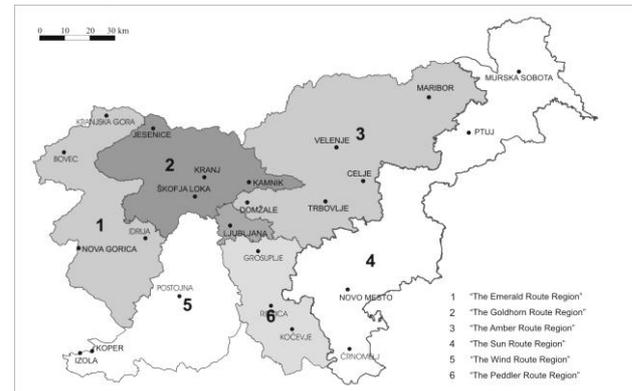


Source: Sirše et al., 1993.

In transit to Croatia’s Mediterranean coast, millions of tourists remain on four lane highways and crisscross Slovenia in a couple of hours and without being acquainted with country’s specifics. Recognition of this fact produced the idea of re-routing tourists off highways. The product “Byways are more attractive than highways” along with the phrase “Let’s take the next exit” were born. Diverse geographic regions now have intermingled with each other in 6 north-south/south-north highway (better: byway) directions. New “subjects of tourism” and tourism regions have been created. The following touristic regions, based on geographic, historic and cultural heritage have set foot (STO, 2005): 1. Emerald Route (from the sources of the Soča River to innumerable green treasures); 2. Wind Route (to the

mysterious Karst and the Adriatic Sea); 3. Amber Route (on the trail of our ancestors); 4. Sun Route (through the warm region of wine and healing waters); 5. Peddler Route (from all corners of the world to the white birches); 6. Gold horn Route (with a view of Alps and lakes). In the follow-up implementation of the above discussed strategy by the Slovenian Tourist Board’s Development plans and directions tourism products have become the lead element in tourism promotion and in the creation of contemporary touristic regions. Geography has been regarded only as a general environmental factor to be considered and partly, on a small-scale in specific socially/historically related contexts, for example in conjunction with gastro- and enological features (=products).

Fig. 6 - Slovenia: Tourism Regions According to the Tourism Product “Byways are More Attractive than Highways”



Source: STO, 2005

6. Conclusion

Within Yugoslavia, Slovenia was characterized as a tourism transit area/province. Tourism visits have concentrated on the Mediterranean coast on which Slovenia participated with just 2.2%. A rather strong concentration in a small number of tourist areas remains a characteristic of Slovene tourism even today (in 2010 62.1% of tourist nights were registered in just 10 out of 210 Slovenian municipalities). On the other hand, these destinations are distributed in different Slovenian regions – unlike the countries with a strong concentration in just one landscape type (e.g. neighboring Croatia on the Adriatic coast). According to Cigale (2010), the reason to visit Slovenian touristic regions today is highly linked to 1. the outstanding recognition of the resort/region; 2. the accessibility of the place; 3. the major highway net; and 4. the touristic product (which is within the sphere of traditional tourist interest).

In the European context, Slovenia is a moderately developed tourist destination. According to ESPON study (ESPON, 2006), it is a "medium-high penetrated destination"²

² This classification was based on the Tourism Penetration Index (TPI), which took into account data on tourist expenditure per capita, density of tourists per 1000 population, and the number of bed spaces or

(along with Italy, Portugal, Germany, etc.). As for the trends in the last decade, Slovenia has experienced an above-average rate of tourism growth. Among 29 European countries, for which data from the Eurostat database (Eurostat – Tourism statistics, 2012) are available for the entire decade 2001-2010, Slovenia ranks 5th in regard to the growth in number of tourist nights (number of tourist nights in 2010 was 22.8% higher than in 2001).

Tourists are attracted predominantly by country's natural features. Because of its picturesque, heterogeneous landscape, well-preserved environment and favorable location in relation to its main tourism markets, Slovenia will likely remain a popular tourist destination. Nonetheless, tourism in Slovenia is already facing many challenges (e.g. unreliable snow cover in winter season in Alpine resorts as a result of the climate change impacts).

Due to the growing competition on the global tourism market a continuous adaptation to the changing tourist demand is of crucial importance, taking into account not just short-term gains but especially tourism sector's long-term viability.

rooms per square kilometre. Consequently, it reflects different aspects of tourism development.

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