

TOURISMUSGEOGRAPHIE

TRENDS AND CHARACTERISTICS OF TOURISM DEVELOPMENT IN SLOVENIA

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with 11 figures and 9 tables in the text

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Zusammenfassung

Trends und Merkmale der Tourismusentwicklung in Slowenien

Der Beitrag befasst sich mit geographischen Merkmalen Sloweniens aus der Perspektive der Tourismusentwicklung und präsentiert wichtige Prozesse, die diese in den letzten Jahrzehnten geprägt haben. Der Tourismus hat sowohl das Erscheinungsbild als auch die

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wirtschaftliche und soziale Struktur vieler slowenischer Regionen maßgeblich bestimmt. Der Beitrag legt sein Hauptaugenmerk sowohl auf die verschiedenen Faktoren, welche die touristische Attraktivität Sloweniens und seiner Regionen ausmachen, als auch auf die Veränderung des touristischen Angebots und der touristischen Nachfrage in den letzten Jahrzehnten und ihren Zusammenhang mit den politischen und wirtschaftlichen Vorgängen.

In letzter Zeit lag das Tourismuswachstum in Slowenien über dem Durchschnitt Europas. Etliche geopolitische Entscheidungen des Staates beeinflussten die Entwicklung der Tourismuswirtschaft: Slowenien wurde ein Mitglied der Europäischen Union (EU) und des Nordatlantik-Paktes (NATO) (2004), führte den Euro als nationale Währung ein (2007) und wurde ein Mitglied der Schengen-Zone (2009). Die Auswirkungen dieser Veränderungen waren aber nicht mit jenen politischen und wirtschaftlichen Umbrüchen vergleichbar, die mit dem Zerfall Jugoslawiens verbunden waren, der einen drastischen Rückgang der Zahlen ausländischer Touristen zu Beginn der 1990er Jahre zur Folge hatte.

Trotz langfristigen Wachstums sieht sich der Tourismus in Slowenien vielen Herausforderungen gegenüber (z.B. unsichere Schneedecke in der Wintersaison in den alpinen Destinationen als Folge des Klimawandels). Obwohl das Wachstum des Tourismus in jenen Gebieten, in denen er am intensivsten ist, auch einige Umwelt- und soziale Probleme verursacht hat (oder zumindest zu ihnen beigetragen), sind die Auswirkungen dennoch eher gering geblieben. Einer der wichtigen Gründe dafür, warum es durch den Tourismus bis jetzt noch keine größeren Umwelt- und sozialen Probleme gibt, ist die Tatsache, dass Slowenien keinen wirklichen Massentourismus entwickelt hat. Im europäischen Vergleich blieb Slowenien eine nur mäßig entwickelte Tourismusdestination.

Wegen der wachsenden Konkurrenz am globalen Tourismusmarkt ist eine ständige Anpassung an die sich wandelnde touristische Nachfrage notwendig. Sie darf nicht auf kurzfristige Gewinne ausgerichtet sein, sondern muss das langfristige Überleben des Tourismussektors im Auge haben. Unter diesem Aspekt sollte auch den Prinzipien eines nachhaltigen Tourismus mehr Beachtung geschenkt werden.

Schlagwörter: Tourismusentwicklung, Slowenien, Tourismusregionen, natürliches und kulturelles Erbe

Summary

The paper discusses geographical characteristics of Slovenia from the perspective of tourism development and presents main processes that have marked it in the last decades. Tourism has significantly affected the appearance as well as economic and social structure of many Slovenian regions. The paper focuses on the role of various factors, which influenced tourist attraction of Slovenia and its regions, as well as on changes in tourism supply and demand in the last decades and their relation to some of the political and economic events.

Recently, Slovenia has experienced an above-average rate of tourism growth. Several of the nation-state's geopolitical decisions impacted the growth of the tourism economy: Slovenia became a member of the European Union (EU) and the North Atlantic Treaty

Organisation (NATO) (2004), introduced the Euro as the national currency (2007) and became a full member of the Schengen Space (2009). However, impacts of these changes were not comparable to the impacts of political and economic disruptions, related to the disintegration of Yugoslavia, which caused drastic decline in foreign tourists' numbers at the beginning of the 1990s.

Despite long-term growth trends, tourism in Slovenia is already facing many challenges (e.g., unreliable snow cover in the winter season in Alpine resorts as a result of the climate change impacts). Moreover, the growth of tourism has caused some environmental and social problems (or at least contributed to them) in those areas where tourism development has been the most intensive. Nevertheless, impacts of tourism have been rather limited. One of the important reasons why, so far, tourism has not caused any large-scale environmental or social problems is the fact that Slovenia has not developed real mass tourism. In the European context, Slovenia remains an only moderately developed tourist destination. Due to the growing competition on the global tourism market a continuous adaptation to the changing tourism demand is of crucial importance, taking into account not just short-term gains, but especially tourism sector's long-term viability. From this perspective, also sustainable tourism principles should be considered more relevant.

Keywords: tourism development, Slovenia, tourism regions, natural and cultural heritage

1 Introduction

Slovenia has a rather long history of tourism development. First tourist resorts on the Slovenian ethnic territory emerged in the 19th century and till the end of the century they evolved into popular tourist destinations (e.g., Bled, Rogaška Slatina, Portorož/Portorose). Tourism remained an important economic activity in the times of Yugoslavia, and later on in Slovenia as an independent state. Throughout this time, tourism experienced significant changes as a consequence of various political and economic factors as well as changed tastes of tourists.

Nowadays, tourism in Slovenia is an important economic activity. According to Travel and Tourism Satellite Accounts (TTSA) the share of tourism within the national Gross Domestic Product (GDP) was 7.7% in 2003 and 8.5% in 2006 (ZAGORŠEK et al. 2008). The World Economic Forum (BLANKE & CHIESA 2013, p. 316) estimates that the travel and tourism industry in Slovenia contributed 3.5% of the total GDP and 3.9% of total employment (32,800 jobs), while the travel and tourism economy contributed 12.8% of total GDP and 13.0% (111,000 jobs) of total employment (2012 estimates). In regard to the Travel and Tourism Competitiveness Index (TTCI) for 2013, constructed by the World Economic Forum, Slovenia ranked 36th of 140 countries (BLANKE & CHIESA 2013).

Many Slovenian regions are marked by tourism, which helped change their appearance and economic and social structure. But tourism is highly dependent on geographical characteristics of tourism areas, which often – at least to some extent – affect main features of tourism supply and demand. Thus, the article will focus on the role of various factors (natural and cultural heritage, suitability of landscape for various forms of outdoor recreation, etc.), which influenced tourist attraction of Slovenia and its regions, as well as on

changes in tourism supply and demand in the last decades and their relation to some of the political and economic events.

First, tourism potentials respectively tourist attractions of the Slovenian territory will be discussed. Simultaneously, attention will be paid to their links to tourist visits. Landscape heterogeneity of Slovenia – notwithstanding its small territorial extent – offers extremely heterogeneous tourism spaces even within individual landscape types, what is reflected also in essential differences in characteristics of tourism demand in specific types of tourism areas. Attention will be given also to the differences in behaviour of tourists from various countries.

The newest available data have been used. In the majority of cases, these data relate to 2013 or 2012, while in some cases only older data are available. Data on tourism are collected by the STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA (SORS), while other relevant data are collected and published by various other institutions (e.g., SLOVENIAN ENVIRONMENT AGENCY).

2 Conditions for tourism development

Slovenia is characterised 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 adapted to various landscape/natural geographical features. 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 end of the 19th century (GOSAR 1983b; JERŠIČ 1990; VRTAČNIK GARBAS 2005) and has since shown continuous growth, particularly in the second half of the 20th century. Recently, new amenities and attractions have prolonged the traditionally short season. Another inviting touristic landscape relates to the magnificent world of the south-easterly Alps, where mountain peaks reach 2,864 meters (Triglav) and where deep glacial valleys and glacial lakes (e.g., Bled [Blejsko jezero] and Bohinj [Bohinjsko jezero] 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 Pannonian (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 are 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 (weekend) 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 Southeast 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 of Slovenia are not equally attractive and suitable for tourism and open-air recreation purposes. In general, the sub-Mediterranean region and the region of the 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. Tourism development opportunities have been analysed in JERŠIČ's work on favourable areas for tourism and open-air recreation (JERŠIČ 1999), in which the Alpine and coastal cultural landscapes are characterised as, by far, the most suitable for tourism. This statement is supported by the fact that they are already the most visited regions of Slovenia.

2.1 Protected areas

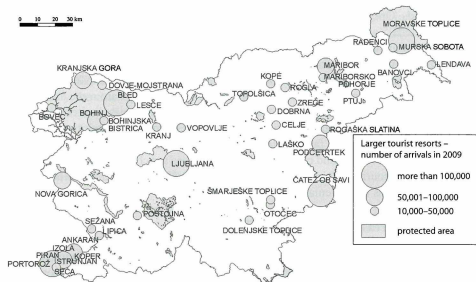
From the viewpoint of tourism and open-air recreation, another important element, namely numerous protected areas of nature and culture, should be named. According to the International Union for Conservation of Nature (IUCN) categorisation, 12.6% of the nation-states' territory (i.e. 256,315 ha) is under different protection status. According to the recent list of protected areas (SLOVENIAN ENVIRONMENT AGENCY 2014), Slovenia has (data for March 2012):

- 1 national park (Triglav National Park [Triglavski narodni park, TNP])
- 3 regional parks
- 44 landscape parks
- 1 strict nature reserve
- 54 nature reserves
- 1,276 natural monuments.

The European Union (EU)-network "Natura 2000" comprises 354 areas (MINISTRY OF AGRICULTURE AND ENVIRONMENT 2014) protected under certain protection restriction: 323 are protected based on EU directives on habitats and 31 on EU directives on birds. Natura 2000 sites are allocated on 37% of the territory of Slovenia. The total area of Natura 2000 amounts to 7,683 km² (7,677 km² on land and 6 km² on the sea) (MINISTRY OF AGRICULTURE AND ENVIRONMENT 2014). As some of the areas of Natura 2000 coincide with already protected sites, and as some additional areas fulfill clauses of Natura 2000, the area under protection extends in the Republic of Slovenia on around 40% of its territory.

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 Salt Pan of Sečovelje [Sečoveljske soline]; Park Cave of Škocjan; Landscape Park Logarska dolina (vehicle toll). The management of protected areas is organised just in about ten cases.



Sources: SLOVENIAN ENVIRONMENT AGENCY, STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 1: Protected areas and tourist resorts in Slovenia

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 centres and metropolitan areas contribute to visits on weekends. Most visitors experience, according to the limited data base, natural attractions in such areas. The internationally well-known Cave of Postojna leads. About 20 years ago it received an average of one 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, they are predominantly due to locality. Therefore, natural attractions close to metropolitan areas and along major highway routes are visited much more intensively than those in periphery. The Vintgar Gorge [soteska Vintgar] of the river Radovna registers a high number of visitors because of its proximity to town, alpine lake and island of Bled, one of the most visited and internationally best-known tourist localities in Slovenia. The main east-west/north-south highway axis passes just a few kilometres away from the Cave of Postojna.

2.2 Cultural heritage and Slovenian tourism

Compared to Slovenia's natural wonders, Slovenia's cultural heritage and related attraction has shown less potential in the eyes of tourists. Several thousand interviews, performed in 2012 (July – August) among foreign visitors by Slovenia's Statistical Office, support the above statement: 53.7% visitors have declared the country's natural beauty as being "very important" for their selection of Slovenia as a holiday destination; but just 18.6% visitors have replied that for their visit of Slovenia cultural attractions and events performed here were very important (STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA 2013). This clearly puts natural heritage in the forefront of attractions of the young nation-state. Despite it, cultural heritage plays an important and growing role in the tourism performance of Slovenia.

Slovenia has, according to the Registry of Cultural Heritage (MINISTRY OF CULTURE 2014), 29,568 registered cultural heritage units. Museums are by domestic and foreign tourists the most-visited institutions of culture. Slovenia has 47 public museums, which are mostly located (70%) in historical buildings (built structures being 120 or more years old); just 15.9% of the museums have been constructed for its purpose. About 60% of the museums offer miscellaneous elements of culture to enjoy, 19% of the museums are specialised, 21% are art galleries. In most museums domestic visitors prevail. Students of different age and study orientation make up to 40% of all visitors (NATIONAL MUSEUM OF SLOVENIA, OFFICE FOR MOVABLE CULTURAL HERITAGE AND MUSEUMS 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 a traffic-preferred location, are the predominant centres 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 the 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 (e.g., 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 (e.g., Castle of Podčetrtek).

Cultural attractions are in the majority of cases visited predominantly by domestic visitors (including school groups). An exception are especially cultural attractions in tourist areas popular with foreign tourists (e.g., Bled Castle Museum, Predjama Castle in the vicinity of the Cave of Postojna). On the other hand, numerous cultural tourist attractions are visited almost exclusively by domestic visitors (e.g., the birthplace of the Protestant clergyman, theologian and writer Primož Trubar in Rašica, the birthplace of the poet Dr. France Prešeren in Vrba, the Rogatec Open-Air Museum or even the National Museum of Slovenia, Ljubljana).

Tourists are not only interested to visit single structures, but show their affiliation to complex urban centres, their parts and interesting architectural structures within. Many Slovenian towns are characterised 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.

Tourist attraction	Number of visitors	% domestic	% foreign
Bled Castle Museum	221,230	34.4	65.6
Virtual Museum and Viewing Tower at the Ljubljana Castle [Ljubljanski grad]	122,753	53.6	46.4
Predjama Castle [Predjamski grad]	115,079	22.9	77.1
Stud Farm Lipica [Kobilarna Lipica]	95,730	26.6	73.4
Old Castle Celje [Stari grad Celje]	65,700	78.8	21.2
Ptuj Regional Museum	64,865	75.5	24.5
Kobarid Museum	63,904	36.1	63.9
Savinjski gaj Park, Mozirje	52,000	83.7	16.3
Town Museum Škofja Loka	50,500	81.1	18.9
Technical Museum of Slovenia, Bistra	43,028	92.6	7.4
Volčji Potok Arboretum	41,152	91.3	8.7
National Museum of Slovenia, Ljubljana	37,510	85.9	14.1
Coalmining Museum of Slovenia, Velenje	25,787	90.3	9.7
Božidar Jakac Gallery, Kostanjevica na Krki	25,628	90.1	9.9
Birthplace of Protestant clergyman, theologian and writer Primož Trubar, Rašica	24,314	97.6	2.4
Birthplace of the poet Dr. France Prešeren, Vrba	24,248	98.6	1.4
Regional park – Sečovelje Salt-Pans [Sečoveljske soline]	23,147	84.5	15.5
Slovenian Museum of Natural History, Ljubljana	22,250	84.5	15.5
Rogatec Open-Air Museum	22,224	89.7	10.3

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA (Since 2008 SORS no longer publishes data on visitors of cultural tourist attractions.)

Tab. 1: Cultural heritage attractions in Slovenia and numbers of visitors in 2008

2.3 Sports, recreation and other infrastructure

Opportunities for recreation are among the important reasons to visit Slovenia. According to the questionnaires distributed to tourists in 2012, 27.5% foreign visitors responded that sports and/or recreation is a “very important” holiday motive in deciding to visit Slovenia as their holiday destination (STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA 2013). One must add that sport facilities and recreation possibilities available are visited and used by local residents as well.

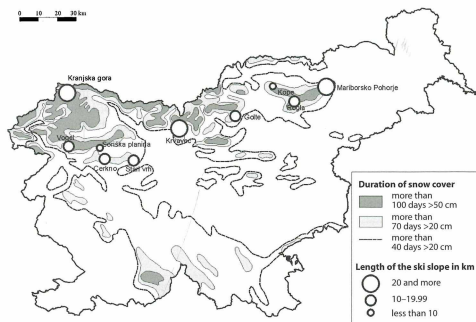
The Slovenian landscape offers favourable possibilities for many sport activities, among which – because of their popularity among tourists and local population – at least Alpine skiing, mountaineering and bathing should be mentioned.

2.3.1 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, 17th century), but ski resorts started to grow predominantly in the second half of the 20th century. Along with major resorts, like Kranjska Gora and Maribor – where international athletic competitions take place annually – a dozen smaller resorts have become popular on the national and European regional scales. Small skiing operations prevail, only three skiing areas provide skiing on areas bigger than 100 hectares; only five have more than ten cable-cars operational and just ten skiing areas have more than ten kilometers of skiing slopes. The biggest density of winter-sport resorts is due to natural conditions (relief intensity, snow-cover height and length) located in the mountainous area of the Slovenian Alps.

Alpine skiing is traditionally among the most popular sport activities of Slovenes. In 2008, it was practiced among 16.6% of Slovenian citizens at least 15 years old (PORI & SILA 2010).

Inconvenient is the fact that most of the skiing grounds are on relatively low elevations. Slovenia has just one single skiing area located above 2,000 meters and even this one is currently not operating; most of others are even lower than 1,500 meters above the sea level (Mariborsko Pohorje, Cerklno, Stari vrh, ...). It is understandable that all have



Sources: JERŠIČ 1999, ski areas data: <http://www.snezni-telefon.si/>

Fig. 2: Skiing areas and alpine skiing convenient sites

already had to deal with the problem of climatic change, including 'green winters', which hinder successful economic operations. Therefore, in the early phase of global warming, skiing areas had to switch to artificial snow-making and enlarging systems that could deliver snow throughout the season. Among the larger skiing areas, just two have not installed artificial snow-making machines.

2.3.2 Mountaineering

Mountaineering and hiking is one of the most popular leisure-time activities among visitors and the residential population. According to a survey, mountaineering was the fifth most popular recreation activity of Slovenes: 14% of men and 15% of women declared it most desirable (PORI & SILA 2010). The network of mountain huts and hiking paths has shown a steady growth since the 2nd half of the 19th century. After World War II, 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 1,235 mountain/hiking paths exist and 8,689 km of them are marked accordingly. About 35% of hiking paths exist in the area of the Slovenian Alps and 34% in the pre-Alpine regions, followed by hiking paths in the Dinaric karst (19%), the sub-Pannonian (Danubian) hills (10%) and in the sub-Mediterranean area (2%). In accordance with the above, the Slovenian Alps lead in regard to the density of hiking paths. There, about close to 1,000 meters of paths can be found on one square kilometer of land area. Even the pre-alpine piedmont areas of the Slovenian Alps have a density of 700 m/km² (JERŠIČ 1999). In addition to this infrastructure, the steep mountain walls offer several hundred of climbing routes, which are very popular among alpinists.

In relation to the popularity of mountaineering and hiking, a specific accommodation infrastructure (mountain huts) has enriched the mountainous landscape of Slovenia. According to the STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA (2014), in August 2013 mountain huts provided 5.7% of available tourist beds in the country; in the off-season months, this number is reduced to below 4%. Of course, the vast majority of them (74.1%) were located in the 'mountain resorts'.

Because of its seasonal character, the percentage of bed-nights in mountain huts (in 2013) was only 0.9%. In the mountain resorts this percentage was higher (3.4%), but still rather modest. Daily visits prevail and the most popular huts (especially in the Julian Alps [Julijske Alpe] – Triglav area, Vršič area, etc.) receive more than 20,000 visitors per year (RECER 1999).

2.3.3 Outdoor swimming/bathing

The Environmental Agency has registered 46 outdoor bathing localities: 21 along the sea coast, eight on lake shores and 17 on banks of rivers (MINISTRY OF THE ENVIRONMENT AND SPATIAL PLANNING 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. Eleven out-

door bathing localities (in 2013) proudly show their Blue Flag for exceptional quality and environmental friendly approaches to recreation, the majority of them in the most popular tourist areas (DRUŠTVO ZA OKOLJSKO VZGOJO 2014). They must achieve certain criteria in regard to the suitability of the bathing waters, general equipment of the facility, appropriate visitors information and more.

3 Motives of foreign tourists for visiting Slovenia

The characteristics of Slovenian regions and tourism offer are attractive to tourists to a various extent. The survey on foreign tourists shows that the most important reason for visiting Slovenia are “beauties of nature”, while among the most important are also “climatic conditions”, “opportunities for resting and relaxing” and “personal safety during the stay”. These attributes are very important for the majority of tourists.

In regard to some of the motives, big differences among tourists from different countries can be observed. E.g., “climatic conditions” are very important or important for

Motive for spending holidays in Slovenia	All respondents	Austria	Italy	Germany
Beauties of nature	93.7	88.8*	87.5	95.5
Climatic conditions	79.6	84.2*	71.3	83.6
Opportunities for resting and relaxing	79.3	75.9*	79.3	80.0
Personal safety during the stay	75.3	76.1*	70.2	73.5
Favourable prices	58.6	65.7*	65.3*	57.5*
Recreational activities	58.0	56.4*	48.1*	57.2*
Cultural sites and events	54.8	40.8*	43.1*	44.0*
Suitability for family holidays	48.6	38.2*	46.1	51.7*
Variety of fun and entertainment	45.1	43.5*	52.4*	29.9*
Care for health and well-being (wellness)	38.1	36.1*	47.1*	29.9*
Close to home	24.7	***	41.2*	24.0*
Shopping	21.8	28.5*	15.9*	20.6*
Convenience and frequency of flights to the country	20.6	***	19.2*	14.9*
Gambling	10.2	***	22.6*	***

* less reliable estimation, *** too small a value for the estimation to be accurate

Sources: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 2: Holiday tourists by motives for choosing Slovenia as a holiday destination (% of “very important” and “important”, July – August 2012)

84.2% of Austrian tourists, but only for 71.3% of Italian tourists. Similarly, "suitability for family holidays" is very important or important for 51.7% of German tourists, but only for 38.2% of Austrian tourists. This draws attention to a very heterogeneous character of tourism demand in Slovenia. Differences in motives of tourists from various countries are related also to the availability of other destinations closer to home, which offer similar attractions.

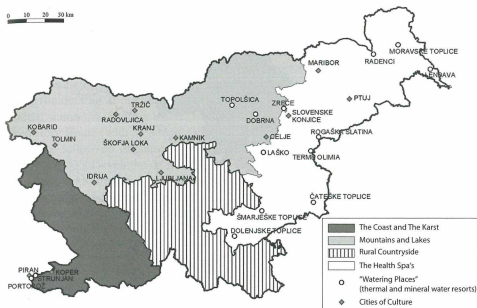
Because of the changes in statistical methodology, direct comparison with older data is not really possible, but available data unequivocally show that in the last two decades the motives of foreign tourists for visiting Slovenia have not significantly changed. Thus, in 1997 the three most important motives for deciding to visit Slovenia were the same (i.e. beauties of nature, climate, opportunities for resting and relaxing) as today (ŠKAFAR BOŽIČ, ZALETEL & ARNEŽ 1998).

4 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 Italian-Austrian-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 recognisable 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 characterised the (unknown) 'touristic destination': "Slovenia – the Green Piece of Europe" (1994), "Slovenia Invigorates" (2002) and, finally "I Feel SLOVEnia" (2007).

The first regionalisation devoted to/for tourism was written 50 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 (PLANINA & MIHALIČ 1985) have challenged the initial regionalisation by KOKOLE (1965), but not one single author questioned the initial four geographic regions as major 'tourist destinations': the south-eastern Alps, the Pannonian/Danubian flatlands and hills, the karstic ridge of the Dinaric Alps, and the Mediterranean coastal zone. Basic regionalisation criteria aimed at attracting tourists were based on natural appearance and character. Physical geography was the lead-segment of regionalisation. 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



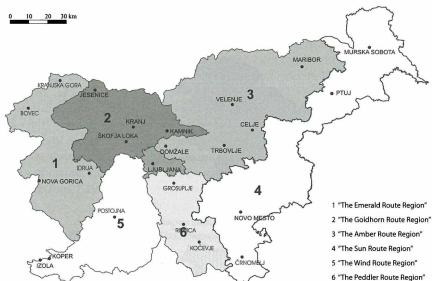
Source: SIRŠE, STROJ-VRTAČNIK & POBEGA 1993

Fig. 3: Tourism regions according to the Tourism Development Strategy

of military confrontation from the peaceful part of Europe (with the exception of the Ten-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, STROJ-VRTAČNIK & POBEGA 1993; SIRŠE 1995). This initial development strategy distinguished between five 'tourism subjects': 1. Coast and the Karst, 2. Mountains and Lakes, 3. Natural Health Resorts, 4. Rural Countryside and 5. Historic Towns.

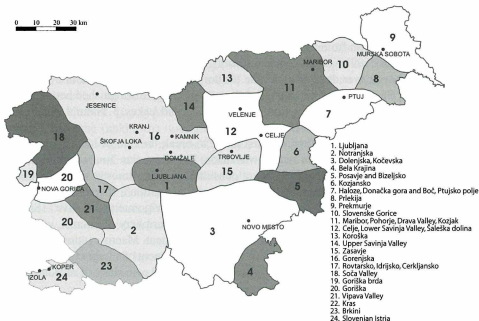
At the dawn of the 21st century, the first move to break the rule of identifying 'touristic regions' with the geographic setting was made. The Slovenian Tourist Board (STO) accepted the proposal of Imago Slovenia, a consultant firm, to foresee six promotional segments: "Invigorate your Senses", "Invigorate your Imagination", "Invigorate your Passion", "Invigorate your Body", "Invigorate your Soul", "Invigorate your Drive" (SLOVENIAN TOURIST BOARD 2004). Geography was moved to the periphery of interest, while the visitor's motives were put into the foreground of advertisement. Macro-centres 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 their existence.

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 the 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



Source: SLOVENIAN TOURIST BOARD 2005

Fig. 4: Tourism regions according to the tourism product "Byways are more attractive than highways"



Source: SLOVENIAN TOURIST BOARD 2009

Fig. 5: Culinary regions

“Let’s take the next exit” were born. Diverse geographic regions now have intermingled with each other in six 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 (SLOVENIAN TOURIST BOARD 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).

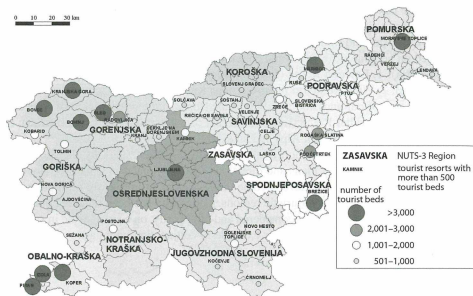
In the follow-up implementation of the above-discussed strategy by the Slovenian Tourist Board’s Development plans and directions [Razvojni načrt in usmeritve slovenskega turizma] tourism products have become the lead element in tourism promotion and in the creation of contemporary touristic regions. Geography has been regarded only as a general environmental factor to be considered and only partly, on a small-scale in specific socially/historically related contexts, for example in conjunction with gastro- and enological features (= products).

5 Tourist accommodation

A large portion of the Slovenian tourism amenities, hotels, and other infrastructure, was built in larger existing tourist resorts in the 1960s and 1970s. Beginning in the early 1960s, 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 had been 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 1960 and 1970 the number of beds in touristic amenities increased by 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 1990s. 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 the decline in the early 1990s, the accommodation quantity in Slovenia has again consistently grown. Tourist beds exceed 100,000 (in 2013: 122,177). A direct comparison with data from the past is hard to achieve since statistical registration has changed.

Accommodation amenities are mostly in municipalities located in mountainous areas (32.3% in 2013), followed by municipalities on the Mediterranean/Adriatic coast (20.3%) and municipalities with mineral and/or thermal water springs (18.3%). 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 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 2013, three statistical regions (out of 12) along the Italian border registered 53.1% beds for tourists.



Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 6: Number of tourist beds by municipalities (in 2013)

An outstanding concentration of touristic amenities is registered in the Slovenian Mediterranean littoral: the three coastal municipalities of Koper/Capodistria, Izola/Isola, and Piran/Pirano, occupying 1.9% of the nation-state's territory, had 24,560 beds or 20.2% of all in-state beds (121,541) available for visitors in 2012. 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. Here, in Slovenian Istria [Istra], about 63.89 beds per square kilometres have been registered in 2012. This number is well above the Slovenian average, where this indicator of importance of the tourism economy is 6.0 beds/km².

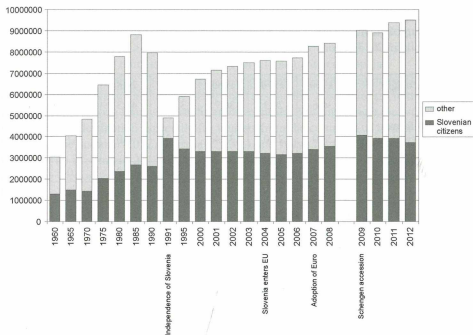
In the second half of the 20th century, the growth of amenities in tourism was linked to changing demands of visitors to Slovenian resorts and regions. As a result of interest in health-related, and in particular wellness-related, commodities, new tourist resorts in the eastern region were developed: Moravske Toplice, Banovci, Podčetrtek, Terme Olimia, for example. Despite heavy investment 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.

The structure of touristic amenities has changed in the last decades. In 1970, the share of tourist beds in hotels amounted only to 21.9%, while in 2009 their share was 39.6%. Additionally, within the hotel sector, an increased importance of four- and five star hotels can be observed. In only six years from 2003 to 2009 the share of four- and five star hotels within the hotel sector increased from 15.8% to 22.5%.

6 Tourism demand

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 (2009) and completed the construction of 330 kilometers of major four-lane highways (2011).

Impacts of these changes were not comparable to the impacts of political and economic disruptions, related to disintegration of Yugoslavia, which caused drastic decline in foreign tourist numbers (see Fig 7). Thus, the introduction of the Euro caused some positive and some negative impacts (elimination of exchange-rate transaction costs, better price comparisons in the Euro zone, higher prices; NEMEC RUDEŽ & BOJNEC 2008), but they were not reflected in changed visitor numbers.



Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA (Data for 2009–2012 are not directly comparable with older data due to changed statistical methodology.)

Fig. 7: Tourist bed-nights in Slovenia (1960–2012)

6.1 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. For many years, the most numerous non-Slovene visitors were Croats and Serbs, but till 1991 they were counted among domestic tourists. In the 1980s, among foreign tourists 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%). This proportion remained steady, albeit with fewer Germans in the mid-1990s: 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 2013, the largest share of bed-nights was made by Italian visitors (9.7%), followed by Austrian (7.3%) and German tourists (7.2%). One must not oversee the rising importance of the Central, East, and South-East tourist markets. The most noticeable change is the increase in the percentage of Russian tourists, which was only 1.3% in 2005, while in 2013 already 3.6%.

Country of origin	1960	1970	1980	1990	2000	2010	2013
Slovenia	36.6	29.3	30.7	32.8	49.3	43.9	37.8
The area of former Yugoslavia (without Slovenia)	28.0	23.0	33.4	21.0	6.0	6.7	6.6
Austria	4.2	8.8	3.8	4.2	7.8	7.0	7.3
Italy	2.7	9.5	3.7	9.0	9.7	11.1	9.7
United Kingdom	1.3	2	1.9	7.2	2.3	2.7	2.6
Netherlands	0.6	4.6	3.9	4.2	1.9	2.3	3.3
Germany*	4.3	13.7	13.0	9.7	11.5	6.5	7.2
Hungary	0.1	0.6	0.8	0.4	1.3	1.6	1.7
Russian Federation**	---	0.2	0.2	0.7	1	2.3	3.6

* Till 1990 BRD and DDR; **till 1990 Soviet Union.

SOURCE: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 3: Bed-nights (%) according to tourists' country of origin

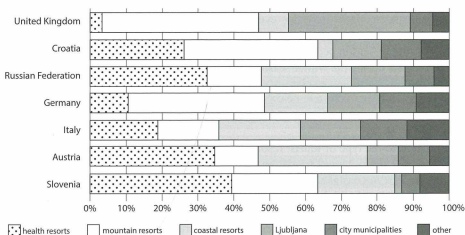
The most significant long-term changes were related to the tourists from the areas of former Yugoslavia. Thus, in 1980 the share of bed-nights of tourists from other Yugoslav republics (33.4%) surpassed the share of Slovenian tourists (30.7%). After the disintegration of Yugoslavia the numbers of tourists from other republics of former Yugoslavia drastically declined, and in 1995 they contributed only 6.3% of bed-nights. Till now, this share has increased only slightly and was 6.6% in 2013.

All along, Slovenian tourists are more numerous than tourists from any other country. They dominated the market especially in the first ten years after Slovenia's declaration of independence. In 1995, they made up more than half (58.6%) of all bed-nights. In the new millennium, the share of their bed-nights is continuously decreasing and it was only 37.8% in 2013.

Arrivals of tourists from some countries are strongly concentrated in only a few areas. This is evident from the data for NUTS-3 regions. E.g., 38.6% of all arrivals of tourists from the United Kingdom in 2012 were registered only in the Upper Carniola Region [Gorenjska regija]. A similar concentration (38.5%) could be observed in regard to tourists from the United States, but in this case in the Central Slovenia Region [Osrednjeslovenska regija] as a consequence of their interest in visiting the country's capital Ljubljana. Also visits of Austrian tourists are very concentrated – 31.3% of their arrivals were (in 2012) registered in Coastal-Karst Region [Obalno-kraška regija].

Even more instructive is the analysis of distribution of tourists by types of tourist resorts (municipalities), which draws attention to the different motives of tourists from various countries (see Fig. 8). The majority of tourists from the United Kingdom and Croatia visit mountain resorts, while the majority of Slovenian and Austrian tourists visit coastal resorts. With Austrian tourists, also health resorts (spas) are very popular.

Many foreign tourists visit Slovenia as one of two or more destination countries or make a stop in Slovenia on the way to the main destination. Also in regard to this there are big differences among tourists from different countries. Within a single tourist trip Slovenia is the only destination especially for tourists from the countries of former Yugoslavia (81.7% in the summer 2012), Austria (79.3%) and Italy (74.4%). The share of German tourists, who in summer 2012 visited Slovenia as the only destination, was 52.3%, while this share was only 35.9% for other West European tourists (STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA 2013).



Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 8: Tourist arrivals in 2012 (% by resort types)

Country of origin	% of respondents
Austria	79.3
Italy	74.4
Germany	52.3
Countries from the area of former Yugoslavia	81.7
West European countries	46.1
Other countries	35.9
East European countries	60.8
All foreign nationalities	57.5

SOURCE: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 4: Percentage of foreign tourists for whom Slovenia was the only holiday destination (July – August 2012)

Slovenia thus represents a very different holiday destination for tourists from various countries. These differences are related to the distance from the country of origin, characteristics of tourists, their motives for visiting Slovenia and many other factors. Discussing Slovenia as a homogeneous tourist destination is thus necessarily a very generalising undertaking, which blurs very important internal differences.

6.2 Seasonality

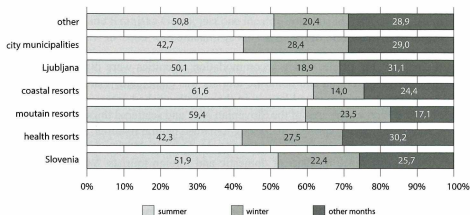
The predominant seasonality of tourism is one of the characteristics of visits to resorts and areas of touristic importance in Slovenia. Despite other expectations (investments into in-door recreation, introduction of all-seasons tourism products: gaming and gambling, congresses and seminars, ...), this even shows an increasing trend. In the peak season, between June and September, 41.6% bed-nights were registered in 2000. In 2013, the share of summer-season bed-nights registered climbed to 51.9%. The proportion of visits and bed-nights during the winter season (January – March, December) was only 22.4%.

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 2013 was much higher by foreign visitors (56.2%) as the domestic tourists' summer-season bed-nights fell to 44.9%.

In regard to the type of tourist resort, seasonality was the most pronounced in coastal municipalities. The share of tourist bed-nights registered in summer (June – September) was the highest in coastal resorts (61.6% in 2013) and the lowest in spa resorts (42.3%). In winter months, the highest share of bed-nights was registered in city municipalities (28.4%) and the lowest in coastal resorts (14.0%).

Differences in seasonality between types of tourist resorts are very pronounced, but even bigger are the differences between tourists from different countries. Tourists from some countries visit Slovenia almost exclusively in summer. In 2013, in four months between June and September 90.1% of bed-nights of Israeli tourists were registered, 88.0%

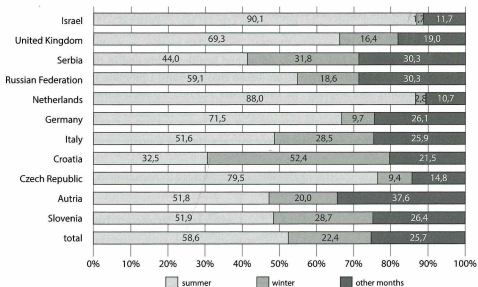
of bed-nights of tourists from the Netherlands, 79.5% of Czech tourists. In contrast, in the same four-month period only 32.5% of bed-nights of Croatian tourists were registered. The share of bed-nights in winter months is less than a quarter by tourists from the



Summer = June – September; Winter = January – March + December

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 9: Seasonal distribution of bed-nights according to tourist-ressort type in 2013



Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 10: Bed-nights of tourists from selected countries by seasons (2013 data)

majority of countries. An exception to the rule are especially Croatian tourists (52.4% of bed nights in four winter months, i.e. in January, February, March and December). High shares of winter bed-nights are characteristic also of Serbian (31.8%), Slovenian (28.7%) and Italian (28.5) tourists. Percentages of winter bed-nights by Israeli and Dutch tourists are almost negligible (1.7 and 2.8%).

6.3 Regional distribution of tourists

In the part of this article, 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 three 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 Coastal-Karst Region and the Upper Carniola Region (see Fig. 6). 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 Savinja Region [Savinjska regija] (and not the alpine Upper Carniola Region) ranks second in popularity among Slovenian tourists. Considering just bed-nights, the Coastal-Karst Region and Upper Carniola 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 few main resorts have prevailed (51% and more in top ten most-visited tourist centres). This remains the case in Slovenia in the 21st century as well; tourist visits are well above average in a few coastal, alpine and health resorts and in the country's capital Ljubljana. If just tourist arrivals are taken into account, Ljubljana is, throughout the nation, the leading tourist place. In 1960 it had 129,332 visitors, almost the double the Alpine tourist resort of Bled (67,123 tourist visits). Recently, the second place is shared by Mediterranean Portorož/Portorose. If just bed-nights are considered, this coastal resort is the leading tourist resort due to the longer average stays of tourists.

Year	%
1960	52.3
1970	56.4
1980	56.1
1990	55.3
2000	54.9
2009	55.1

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 5: Accumulative share of tourists in the top ten most-visited tourist centres

The major change in the distribution of tourists took place as the role of health resorts changed due to heavy nation-state investment (GOSAR 2010) and because mountain resorts reduced their share within the tourism economy due to a lack of visitors from the tourism markets of Southeast Europe (Yugoslavia). Namely, among ten leading resorts in 1960, four tourist centres were located in the heart of the Slovenian Alps (Bled, Bohinj, Eastern Pohorje and Kranjska Gora); just one locality could be identified as a health resort (Rogaška Slatina). In 2009, three health resorts (Čatež ob Savi, Moravske Toplice and Podčetrtek) and two mountain resorts (Bled, Kranjska Gora) were among Slovenia's top ten tourist centres. The rise of health resorts since Slovenia's independence is also the result of innovative management.

NUTS-3 region	Bed-nights	Bed-nights (%)	Tourist arrivals	Tourist arrivals (%)	Average length of stay (days)	Bed-nights of domestic tourists (%)	Bed-nights of foreign tourists (%)
Slovenia	9,510,663	100.0	3,297,556	100.0	2.9	100.0	100.0
Pomurska	931,370	9.8	257,548	7.8	3.6	14.8	6.6
Podravska	556,375	5.9	229,747	7.0	2.4	5.3	6.2
Koroška	104,556	1.1	36,945	1.1	2.8	1.9	0.6
Savinjska	1,430,348	15.0	366,168	11.1	3.9	20.3	11.6
Zasavska	6,723	0.1	2,257	0.1	3.0	0.1	0.1
Spodnjeposavska	620,165	6.5	171,074	5.2	3.6	8.7	5.1
Jugovzhodna	382,929	4.0	111,143	3.4	3.4	6.5	2.4
Osrednjeslovenska	995,472	10.5	521,294	15.8	1.9	2.0	15.9
Gorenjska	1,670,653	17.6	650,220	19.7	2.6	10.7	22.0
Notranjsko-kraška	62,402	0.7	39,160	1.2	1.6	0.4	0.9
Goriška	611,635	6.4	255,177	7.7	2.4	4.8	7.5
Obalno-kraška	2,138,035	22.5	656,823	19.9	3.3	24.6	21.1

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 6: Regional distribution of tourists and bed-nights in 2012

7 Tourism landscapes of Slovenia

Within the Slovenian territory some distinct types of tourism spaces (with specific tourist attractions) evolved. They offer tourists various experiences and fulfil their different motives. Their specific characteristics are reflected also in differences in tourist behaviour. Thus, some resorts are visited as the only destination within a tourist trip, while others predominantly in transit. There are also big differences in average number of bed-nights; this is related to the character of tourism offer in various destinations. Data show noticeable

differences also in regard to the role tourism has in the economy of various areas. E.g., in city municipalities/urban tourism spaces tourism is nowhere the dominant (or one of the dominant) economic activity (activities) and usually tourism changes the urban landscape and structure only to a minor degree. In contrast, in many places in Alpine or Sub-Mediterranean Slovenia, tourism is the main transformer of the landscape and society.

7.1 Urban tourism areas

Towns/cities 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 2013, city municipalities, including Ljubljana, had just 15.4% accommodation amenities (in 2008: 12.8%) and 16.2% bed-nights (in 2008: 14.4%). The capital, Ljubljana, is an outstanding tourism destination, with 948,771 bed-nights in 2013 (in 2008: 777,247).

Therefore, the municipality of Ljubljana is always ranked among the top-five tourist destinations of the country. In the majority of the years since 1960, Ljubljana was in regard to tourist arrivals the first destination in Slovenia, while in regard to the number of bed-nights it was overtaken by some destinations. Contrary to many other European capitals, visits of foreign tourists 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 (in 2013: 232,806 bed-nights), or visits to the Mediterranean littoral tourism in the case of Koper/Capodistria, or gaming and gambling as in the case of Nova Gorica (in 2013: 138,976 bed-nights). Other Slovenian city-municipalities, without similar additional attractions, have registered less than 100,000 bed-nights a year, in the majority of cases even less than 50,000 bed-nights.

7.2 Rural areas

The term *rural tourism* is closely related to the definition of the *countryside*, which can be broadly understood. 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 1970s, 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.

Type of amenities	All	Tourist farms	% tourist farms
Arrivals			
2008	3,083,713	27,262	0.9
2009	2,984,828	31,574	1.1
2010	3,006,272	34,814	1.2
2013	3,384,491	55,545	1.6
Bed-nights			
2008	9,314,038	71,314	0.8
2009	9,013,773	81,309	0.9
2010	8,906,399	83,143	0.9
2013	9,579,033	125,401	1.3

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 7: Tourists arrivals and bed-nights in Slovenian accommodation amenities, 2008–2010

The STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA published in 2013 data of 335 farms, where accommodation is available. According to this source, 4,886 beds there are ready for touristic use. If compared to the national tourism economy's figures, farm tourism accounts for a modest 4.00% of accommodation amenities countrywide.

The distribution of the named amenities is particularly interesting. As discussed earlier, the predominant concentration of tourism-related amenities is in mountainous (in 2013: 32.3%) and Mediterranean (in 2013: 20.3%) environments as well as in municipalities, where health resorts are located (in 2013: 18.3%). In contrast to this, tourism on farms takes place predominantly in (statistically so-called) "other municipalities" – 51.4%, where touristic accommodations make just 13.7% of the national frame. The presence of farm tourism is stronger in mountainous municipalities (29.8%) and in municipalities with health resorts (10.0%). In other types of municipalities (coastal, city municipalities and Ljubljana), just 8.8% 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 by 41.9% in 2013. Growth has been registered in all types of municipalities.

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. The registry distinguishes between 412 pleasure trip farms, 125 wine-shop farms, 38 *osmica* farms (traditionally owners sold food and beverage for eight days in a year; nowadays, the legal limit is two times ten days per year) and six Alpine dairy farms.

In 2013, 55,545 tourists used accommodations on farms, accounting for 1.6% of nation-wide tourism arrivals and 1.3% of national tourist bed-nights. The fact that farms with

accommodation amenities have a share of 4.0% of tourist beds 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, 39.9% in 2013, are registered in the two summer holiday months. Seasonality of tourism on farms is much higher than the national average of seasonality, in which 33.3% of yearly bed-nights are registered in July and August. The reason for the extreme farm-tourism summer seasonality relates to lower visits in the colder time of the year (October – March) due to the lack of attractivity of the farm-tourism offer outside of summer season.

7.3 Spa resorts

Health tourism has in Slovenia a long-standing tradition. The spa Rogaška Slatina became a health-related tourist destination by the 18th century (HORVAT 2000). 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 the 1970s, the national share of tourist visits to spas was 5.9%, and bed-nights accumulated there were just 14.9%. In 2013, about 40 years later, municipalities, where mineral and/or thermal waters are used register 23.3% tourists and 31.5% of national bed-nights. If just bed-nights are considered, spas are the country's leading resorts. The average length of stay is with 3.8 days much higher than in other types of resorts (2.8 days). Since the 1990s, the classic thermal baths have changed into modern resorts (GOSAR 2010) with several swimming pools, whirlpools, massage springs, rushing rivers, water chutes and other attractions called *thermal parks or thermal riviéras*.

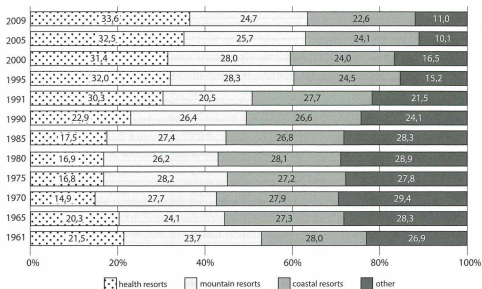
Municipality type	2008	2010	2012
SLOVENIA	3.0	3.0	2.9
Health resort municipalities	4.0	4.0	3.9
Mountain municipalities	2.8	2.8	2.6
Littoral municipalities	3.5	3.5	3.4
Ljubljana	2.0	1.9	1.9
City municipalities	2.1	2.1	2.1
Other municipalities	2.2	2.0	2.0

Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Tab. 8: Length of stay (in days) according to type of municipality

In health resorts, the seasonal variability of tourist visits is the least pronounced, due to the non-seasonal and not-weather dependent character of the health resorts' tourism offer. In four summer months (June – September), only 42.3% of bed-nights were registered in 2013.

Worth mentioning is also the specific national structure of tourists in health resorts. The share of domestic (Slovenian) bed-nights is nowhere as high as in health resorts (55.8% in 2013; e.g., in mountain resorts this share is only 28.3%). Among foreign tourists, Austrian tourists are the most numerous (23.6% of all foreign bed-nights in 2013).



Source: STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

Fig. 11: Tourist bed-nights by types of resorts 1961–2009 (in %)

7.4 Mountain resorts

Slovenian winter-sport resorts are mainly focused on guests preferring Alpine skiing. Rare are centres, 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, are important. Some of the winter-sport centres – like Mozirje/Golte, Krvavec, Slovenj Gradec/Kope, Mariborsko Pohorje and Cerkno – register above half of the yearly visitors in winter (January, February, March, December) (see Tab. 9). In contrast, for some well-visited resorts in the core of the Slovenian Alps – like Bovec and Bohinjska Bistrica – the winter season is of less importance (for comparison with other Alpine resorts see MAYER et al. 2011, p. 34). Reasons for this can be found in the facts that (1) natural conditions are not well suited (for Alpine skiing, for example) and (2) they do not have the winter-sport infrastructure.

Recent trends in numerous mountainous areas of the world show an increase of winter-season visits and decreasing numbers of summer-hiking and mountaineering visits

Municipality	Total	Jan. – Mar. + Dec. (%)	June – Sept. (%)	High season*
Bled	602,965	13.1	61.6	summer
Bohinj	332,693	19.0	70.1	summer
Bovec	190,899	7.4	80.8	summer
Cerklje na Gorenjskem	49,855	42.1	38.0	two seasons
Cerkno	32,173	68.5	22.7	winter
Gorje	9,503	20.9	52.8	summer
Hoče-Slivnica	61,145	62.3	22.2	winter
Jezersko	8,170	4.2	65.0	summer
Kamnik	51,948	23.2	56.6	summer
Kobarid	90,012	2.8	83.6	summer
Kranjska Gora	453,144	39.9	45.3	two seasons
Ljubno	4,057	33.8	40.1	two seasons
Mozirje	17,405	66.4	22.3	winter
Preddvor	11,251	26.0	55.6	summer
Prevalje	3,607	21.1	50.2	summer
Radovljica	132,022	3.2	88.5	summer
Ravne na Koroškem	2,966	43.1	34.6	winter
Ribnica na Pohorju	15,943	57.2	32.0	winter
Ruše	12,319	53.5	16.7	winter
Slovenska Bistrica	30,098	60.0	22.3	winter
Solčava	15,517	17.2	63.9	summer
Tolmin	50,867	7.9	69.7	summer
Tržič	1,400	16.9	71.3	summer
Žirovnica	2,947	26.4	59.1	summer

* Summer season: June – September >50 %, January – March + December < 40%; winter season: January – March + December > 40 %, June – September < 50 %

Tab. 9: Seasonal distribution of bed-nights in the most visited Alpine tourism municipalities in 2013

(e.g., JOB 2005 or SCHUCKERT, MÖLLER & WEIERMAIR 2007 for Tyrol [Tirol]). Available data for the Slovenian mountainous area support this general trend. In comparison to the other eight months of the year, the 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.

7.5 Coastal resorts

The history of coastal tourism development in Slovenia dates back to the 19th century. After World War II, in the Koper/Capodistria Coastland [Koprsko Primorje] the largest concentration of tourism facilities in Slovenia was formed, primarily as a consequence of the development of Portorož/Portorose (GOSAR 1983; JERŠIČ 1990; VRTAČNIK & GARBAS 2005). While in the 19th century tourism motives were related predominantly to healing properties of the area, in the second half of 20th century classical coastal Sun, Sand & Sea (3S) tourism developed, but it was quite early enriched with other forms of the tourism offer (casino, congress/event tourism, nautical tourism, etc.).

Today, many particularities in regard to tourist motives and properties of tourist demand are characteristic of this area. Despite several (above-mentioned) attributes of tourism supply, which are not typical for 3S tourism, high seasonality is characteristic. The share of bed-nights in July and August is 39.8%, while in the June-September period close to two thirds (61.6%) of the annual number of bed-nights were registered in 2013. The share of winter bed-nights in 2013 was the smallest of all of the types of tourist resorts. Obviously, an additional, not 3S-related tourism offer is of interest only for relatively small numbers of tourists and it could only diminish the very pronounced seasonality of visits.

The tourism offer of Slovenian coastal resorts is attractive especially for domestic tourists (43.4% of bed-nights in coastal resorts in 2013). Similarly as in health resorts, the most numerous foreign tourists are Austrians (20.7% of all foreign bed-nights in 2013).

Because of the specific characteristics of tourism supply, it is not surprising that in coastal resorts the share of tourists, who come for 'holidays, relaxation, amusement' is the highest among all types of tourist resorts (93.3% in the summer of 2012) (STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA 2013).

8 Conclusion

In the beginning of the third millennium, Slovenia has experienced an above-average rate of tourism growth. Among 29 European countries, for which data from the EUROSTAT database (EUROSTAT 2014) 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 by 22.8% higher than in 2001). Despite this long-term growth trend, important differences between various tourism markets can be observed. Slovenia as a tourist destination is becoming less dependent on domestic tourists and neighbouring countries as the share of tourists from more distant countries (even from other continents) is increasing. Tourists from different countries often look for different types of tourist experience and are visiting Slovenia and its destinations rather selectively. Probably, also their perceptions of Slovenia as a tourist destination differ quite a lot.

For some time now, there is a tendency to introduce 'artificial', indoor, not weather-dependent attractions in tourist resorts, as in health resorts (introduction of *thermal rivas*) or some mountain resorts (e.g., aquapark in Bohinj Bistrica). Such attractions are in the

majority of cases quite successful in attracting new tourists (and retaining the old ones), while resorts without similar innovations are often not experiencing any meaningful tourism growth. Simultaneously, tourists are attracted predominantly by the country's natural features (its 'natural beauties', as shown by SORS surveys). Therefore, the situation is rather a paradoxical one: 'natural beauties' are the necessary, but not the sufficient condition to attract tourists in bigger numbers.

Within Yugoslavia, Slovenia was characterised as a tourism transit area/province. Tourist 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 Slovenian tourism even today. (In 2013, 61.2% of tourist bed-nights were registered in just ten out of 211 Slovenian municipalities.) In contrast, these destinations are distributed over different Slovenian regions – unlike the countries with a strong concentration in just one landscape type (e.g., neighbouring Croatia on the Adriatic coast). According to CIGALE (2010), the reason to visit Slovenian touristic regions today is highly linked to 1st the outstanding recognition of the resort/region; 2nd the accessibility of the place; 3rd the major highway net; and 4th the touristic product (which is within the sphere of traditional tourist interest).

Tourist attractiveness of a country is influenced by numerous factors. In regard to some of them, Slovenia is in a relatively unfavourable position (short Mediterranean coast, modest altitudes in Alpine regions, etc.), while in regard to some others the country's natural and cultural characteristics could be evaluated much more positively. E.g., among all of the European countries, Slovenia has the highest average landscape diversity (CIGLIČ & PERKO 2013) and the highest share of Natura-2000 terrestrial area (37.9% in 2014; EUROPEAN ENVIRONMENT AGENCY 2015).

Because of its picturesque, heterogeneous landscape, relatively well-preserved environment and favourable 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 the winter season in Alpine resorts as a result of the climate-change impacts). Moreover, the growth of tourism has caused some environmental and social problems (or at least contributed to them) in those areas, where tourism development has been the most intensive.

Tourism as a source of environmental pressures plays an important role in various regions of Slovenia. In the most popular tourism areas all of the environmental elements are affected (CIGALE 2006). The actual impacts of tourism related to environmental pressures depend also on the environmental sensitivity of these areas. When taking into account the intensity of these pressures, especially the coastal area (Slovenian Istria) and the Alps should be considered.

In the case of Slovenian Istria large environmental pressures are the consequence of high concentration of visitors and tourism services in a very small area. Pressures related to tourism are concentrated in the narrow coastal belt, where also the impacts of other human activities are most intense (manufacturing, transportation, settlement, etc.). Tourism-carrying capacity analysis for Slovenian Istria (JURINČIČ 2009) has shown that the general infrastructure capacity has been exceeded. Of course, this does not mean that tourism-related problems could be eliminated just by improvement (capacity increase) of

infrastructure, since also some other negative environmental, socio-cultural or/and economic impacts can be at least partly attributed to tourism.

In the Alpine areas some of the most-visited Slovenian tourist resorts are located. At the same time the region's characteristic is a very sensitive environment. The potentially problematic feature of tourism in the Slovenian Alps is the presence of tourists in well-preserved natural areas, also in the especially sensitive ones (for example some protected areas). Besides, the number of tourists is rather large in comparison with the resident population, what could be relevant in regard to the socio-cultural impacts of tourism. Nevertheless, some recent studies have shown that in several important Alpine tourism resorts the vast majority of the local population evaluates tourism impacts as mainly positive (CIGALE 2009).

One of the important reasons, why tourism has not, so far, caused any large-scale environmental or social problems is the fact that Slovenia has not developed real mass tourism. Slovenian tourist resorts (and tourism regions) are much smaller than bigger tourism centres in Europe and also in the neighbouring regions (GOSAR 2003; GOSAR 2004; CIGALE 2006). In the European context, Slovenia is a moderately developed tourist destination. In 2012, Slovenia was ranked 23rd among EU member states in regard to tourist bed-nights. According to an ESPON study (ESPON... 2006), it is a "medium-high penetrated destination" (along with Italy, Portugal, Germany, etc., but behind "mature destinations" such as Austria, Switzerland or Greece).

The comparison of data on tourism demand for European countries shows that values for Slovenia are only moderate. In absolute terms, the large countries are, of course, in the leading positions. Even if we compare the number of tourists and bed-nights with the size of the country (km²) Slovenia is not in the foreground. The same holds true also for the regional level (see SCHMIDT 2002 for EU regional-level comparison). Therefore, Slovenia is at the moment, in comparison with some other European countries, not exposed to excessive tourism pressures, but this does not mean that tourism does not cause negative environmental (CIGALE 2007; MRAK 2009; etc.) and social (e.g., CIGALE 2009) impacts, which should be taken into account.

The current strategy of Slovenian tourism (VLADA REPUBLIKE SLOVENIJE 2012) stresses the importance of sustainable tourism development, while in the everyday reality such considerations are only of secondary importance – on the supply as well as on the demand side (GOSAR & JURINČIČ 2003; CIGALE 2015). Due to the growing competition on the global tourism market a continuous adaptation to the changing tourism demand is of crucial importance, taking into account not just short-term gains, but especially the tourism sector's long-term viability. From this perspective, also sustainable tourism principles should be considered more relevant.

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