

# DRAFT ANNUAL TOURISM REPORTING TEMPLATE

## 1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986<sup>1</sup> establishing a consultation and cooperation procedure in the field of tourism foresees that “each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year  $n$  shall be sent to the European Commission by the end of February of year  $n+1$ .

If the reports are sent in English, the deadline is shifted to the end of April.

## 2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

**2.1** Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

Responsibility for tourism in Slovakia rests with the Ministry of Economy of the Slovak Republic. The Tourism Section of the Ministry consists of one department and one unit – Department of tourism policy and regional development and Unit of foreign relations in tourism.

**Ministry of Economy of the Slovak Republic** (Central body of state administration)

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<sup>1</sup> Official Journal L 384, 31/12/1986 P. 0052 – 0053.

### Tourism Section:

- Determines the state policy of tourism
- Develops strategies and concepts of tourism
- Drafts legislative regulations in tourism
- Analyses and evaluates the conditions of tourism
- Collects statistical data on tourism in Slovakia
- Provides small and medium sized enterprises in tourism with an appropriate support
- Realizes tasks connected with preparation of territorial plans and documents of tourism projects
- Represents interests of the Slovak Republic in international tourism organizations and associations
- Carries out international and cross-border cooperation in the field of tourism
- Is responsible for preparation, realization and fulfillment of international bilateral and multilateral agreements in tourism, development of bilateral contacts and relations between the countries
- Collaborates with other departments in preparation of documents related to drawing EU Structural Funds
- Cooperates with other ministries, tourist associations, tourist regional organizations, etc.

**2.2** Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

The promotion of Slovakia as a tourist destination as well as the corresponding marketing activities is the core responsibility of the Slovak Tourist Board (STB). STB was set up by the Ministry of Economy in 1995 as a non-commercial, state-funded organization specialized on marketing and the state promotion of the tourism industry of Slovakia. The STB has currently seven official representations abroad – in the Czech Republic, the Netherlands, Germany, Poland, Austria, Russian Federation, and Hungary.

### Slovak Tourist Board:

- Carries out the national marketing of the tourist industry
- Provides information on tourism in Slovakia
- Promotes Slovakia as a tourist destination
- Contributes to the positive image of Slovakia abroad
- Serves as the Mediation Organ for activities related to the implementation of the EU Structural Funds in the tourist industry.

**2.3** Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

### Tourism Board of the Ministry of Economy of the Slovak Republic

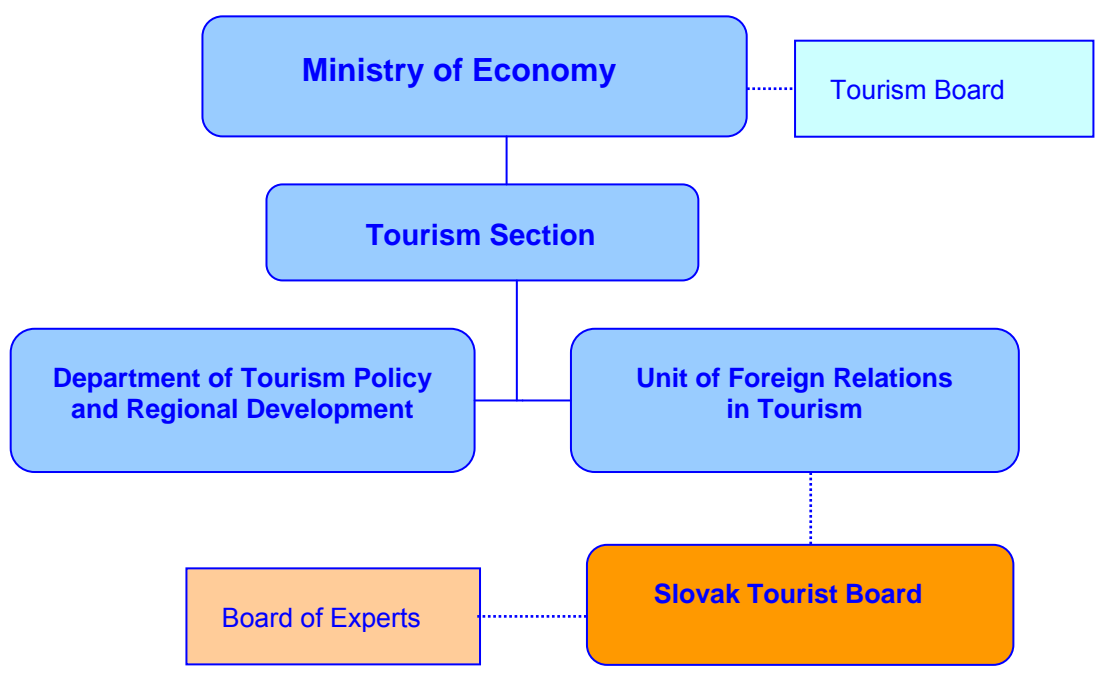
The Board is an inter-departmental coordination body to deal with the issues that are not in the sole competence of the Ministry of Economy and fall under the competence of other ministries, for instance, transportation infrastructure, spa resorts, visa policy, professional education system, preserved monuments, protective measures adopted in preserved areas, etc. It serves as an advisory body of the Minister of Economy focused on the coordination of activities of state administration in the field of tourism with the aim to increase the competitiveness of tourism in Slovakia.

Composition of the Board: Ministry of Economy, Ministry of Transport, Posts and Telecommunications, Ministry of Finance, Ministry of Environment, Ministry of Culture, Ministry of Agriculture, Ministry of Interior, Ministry of Health, Ministry of Labour, Social Affairs and Family, Ministry of Foreign Affairs, Ministry of Education, Ministry of Construction and Regional Development.

The Slovak Cabinet set up in April 2009 a New Consulting Body – a **Council for the Unified Presentation of the Slovak Republic Abroad** whose task is to improve Slovakia's image internationally, and increase the amount of investments and attract more tourists to Slovak destinations. The Council is tasked to present a highly professional introduction of Slovakia, improve its attractiveness and increase its competitiveness. The Cabinet acknowledges that the image of the Slovak Republic has improved in recent years but its thus far presentation by ministries appears to be fragmented, lacking a joint brand and a unifying element. It wants to reach a new dimension of Slovakia's perception.

**2.4** Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

National level



**Board of Experts of the Slovak Tourist Board** – is an advisory body of the Director General of the Slovak Tourist Board. The chairman and members of the Board of Experts are appointed and recalled by the Minister of Economy. The Board of Experts gives its opinion on the overall direction of the organization in its area of activities, taking into consideration the priorities that the Ministry of Economy monitors in the area of tourism development and how the needs of the business sector are satisfied, and also its opinion on the planned strategic objectives of the Slovak Tourist Board in the area of marketing and state promotion of tourism and the implementation of its activities. The opinions expressed by the Board of Experts have the character of recommendations for the Director General, who is fully responsible for the activity of the Slovak Tourist Board.

Regional level

As a result of public service reform in 2001, the competencies with respect to tourism were devolved from a local civil service (district and regional offices) to eight **self-governing bodies** (regional governments – Bratislava, Trnava, Nitra, Trenčín, Žilina, Banská Bystrica, Prešov, Košice) and municipalities. The aim was to strengthen local competencies within the regions and localities which tourists visit, with the municipalities and cities playing the key role in establishing the preconditions for tourism development. The Tourism Section of the Ministry of Economy organises regular working meetings with the representatives of these self-governing bodies in charge of tourism. Their purpose is to co-ordinate the development of tourism in particular regions.

Local level

Local self-government - municipalities and towns - plays an important role in the development of tourism at local level and in co-ordination of entities in connection with this development.

Tourism associations as professional entities also contribute to the development of tourism at local and regional level mainly in the field of improvement of quality, expansion of the range of products and services, development of professions based on professional training, introduction of quality standards and their

implementation, communication of best practices that increase positive benefits, etc.

**2.5** Please provide information about financial data, including spend on tourism as a percentage of overall government spend, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

A special Government session took place in November 2009 devoted to tourism related issues. At this session the Government decided to support financially some tourism projects in Slovakia in amount of app. 8 million EUR.

The financing of tourism in 2009 (EUR):

	2009	
	State budget	EU Structural Funds
Ministerial tourism budget	44 825,00	
Slovak Tourist Board	1 404 000,00	
Entrepreneurial support in tourism	1 792 667,41	5 901 879,23
Tourism infrastructure development	2 622 765,09	9 835 369,26
Promotion and tourist information support	1 440 954,09	6 181 890,55
Total	7 305 211,59	21 919 139,04

Slovakia has the opportunity to use EU funds throughout duration of National Strategic Reference Framework in years 2008-2013. The Managing Authority, which is the Ministry of Economy of the Slovak Republic, is responsible for the efficiency, propriety of management, provision and use of aid in accordance with EU regulations, institutional, legal and financial systems and regulations of the Slovak Republic. Ministry of Economy is using the existing network of implementation agencies under its jurisdiction. For the purpose of tourism the implementation agency is the Slovak Tourist Board.

Within the Sectoral Operational Programme Industry and Services the European Commission approved approx. 63 million EUR for the period 2004-2007 for the tourism development and the promotion of Slovak tourism. Support from Structural Funds was centred on the improvement of infrastructure for tourism and renovation of cultural and historical monuments, establishing educational trails and bicycle lanes including. Moreover, funds were also available for the support of business activities in tourism, which are used for building-up of accommodation and catering establishments, swimming-pools etc.

During the programming period 2008-2013 Slovakia can use European funds in the total amount of 172,6 million EUR for the support of business activities in tourism, development of information tourism services, presentation of regions and Slovakia within the Operational Programme Competitiveness and Economical Growth.

#### Sectoral Operational Programme Industry & Services

Priority: Development of Tourism

Measures:

- Support for construction and refurbishment of tourism infrastructure
- Support for entrepreneurial activities in the field of tourism
- Support for tourism promotion and creation of information system

Total amount: 63 million EUR for 2004-2007

#### Operational Programme Competitiveness and Economical Growth

Priority: Tourism

Measures:

- Support for business activities in tourism
- Development of information tourism services, presentation of regions and of Slovakia

Total amount: 172,6 million EUR for 2008-2013

### 3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes  No

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

#### New Tourism Development Strategy of the Slovak Republic until 2013

The intention of the New Tourism Development Strategy of the Slovak Republic is to react appropriately to globalization trends by making use of the competition elements and for purpose of providing for sustainable development of tourism in the economic, social and environmental area.

#### Strategic goal:

The increase of the competitive strength of tourism by better using its potential with the aim of alleviating regional disparities and creating new jobs.

#### Specific objectives of tourism development:

1. Strengthening the position of tourism as an industry in the national economy
2. Increasing the attractiveness of Slovakia as a holiday destination
3. Bolstering the volume of overnight stays by tourists
4. Improving the structure of foreign visitors coming to Slovakia by raising the quality of the provided services
5. Supporting the creation of new jobs, especially in regions with a significant potential for tourism

#### Leading forms of tourism:

- Summer Tourism and Stays by Water
- Spa and Health Tourism
- Winter Tourism and Winter Sports
- Urban and Cultural Tourism
- Rural Areas Tourism and Agritourism

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

Initiator - The Strategy was drawn up by the Ministry of Economy of the Slovak Republic on the basis of objectives set out in the Manifesto of the Government of the Slovak Republic 2006 – 2010.

Responsibility for implementation has the Ministry of Economy of the Slovak Republic and other ministries, institutions, self-governing regions depending on the character of a task.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The Government of the Slovak Republic obliged the Economy Minister to submit a report on fulfillment of strategic goals resulting from the Strategy to the Government annually as per June 30.

3.4 What tourism specific legislation exists? (maximum 500 characters)

National tourism legislation is harmonized with EU legislation, and the main laws in force are:

- Act on package tours and conditions of doing business by travel offices and travel agencies (No. 281/2001 Coll. as amended by the Act No.186/2006 Coll.)
- Decree of the Ministry of Economy of the Slovak Republic regulating the categorization of accommodation facilities and their grading classification (No. 277/2008 Coll.)

Other important legislation:

- Act No. 561/2007 Coll. on Investment Aid - this act allows for provision of regional investment and employment aid for investment or expansion projects of industrial production, technology centres, strategic service centres, and complex tourism centres. Complex tourism center constitutes a center where at least three different services are offered (example: accommodation, catering and aquapark)
- Act No. 460/1992 Coll. – the Constitution of the Slovak Republic, as amended
- Act No. 513/1991 Coll. – the Commercial Code, as amended
- Act No. 455/1991 Coll. on Licensed Trade (the Trades Act), as amended
- Act No. 369/1990 Coll. on Municipal Establishment, as amended
- Act No. 302/2001 Coll. on Self-government of Higher Territorial Units, as amended
- Legal regulation related to taxes and fees and the environmental protection

The Ministry of Economy of the Slovak Republic prepared a new law on support of tourism in 2009 (approved by the Government on 13 January 2010 and currently in the second reading in the Parliament). The law describes the rights and obligations of tourism stakeholders, organization structure of tourism, creation of conceptual documents and financing of tourism development in Slovakia.

#### **4. MEASURES AND INITIATIVES**

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

##### **1 Economic prosperity**

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

##### **2 Social equity and cohesion**

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

##### **3 Environmental and cultural protection**

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

**4.1** Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

#### 4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

New act on investment aid, which entered into force on January 1, 2008, allows for provision of regional investment and employment aid for investment or expansion projects of industrial production, technology centres, strategic service centres, and complex tourism centres. Complex tourism centre constitutes a centre where at least three different services are offered (example: accommodation, catering and aquapark). The EU Structural Funds offer another possibility to build up such tourism centres in Slovakia. These tourism facilities or complementary tourism services help cope with the seasonality of demand, e.g. by extending tourism season.

The Ministry of Economy of the Slovak Republic approved the [Draft Domestic Tourism Support Programme](#) on 18 December 2008. The aims of the programme are the following:

- to increase the awareness of Slovakia's citizens of holiday spending in their home country
- to increase the participation of domestic people in tourism activities
- to enhance the occupancy rate in Slovak accommodation facilities, mainly out of season
- to improve and extend regional tourism products and use them in domestic tourism offer
- to make tourism more accessible, especially to socially weaker groups of population
- to increase the quality of services rendered.

#### 4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

The development of transport infrastructure belongs to the priorities of the Slovak Government. From the point of view of the development of railway infrastructure, which plays an important role as an alternative to the road infrastructure, mainly with respect to a need to decrease negative impacts of transport on the environment, the Programme of modernization and development of railway infrastructure 2007 – 2010 has been drawn up. The development of railway infrastructure is particularly focused on the modernization of international corridors. 58 km of tracks have been modernized until the end of 2007, 21 km have been electrified, and the next 30 km will be modernized until the end of 2008. The EU Structural Funds play an important role in the development of transport infrastructure in Slovakia.

#### 4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

One of the basic principles of the State Tourism Policy of the Slovak Republic adopted by the Slovak Government in 2007 is the following: "Tourism is a tool of developing employment and flexibility of labour markets". The Ministry of Education is currently working on a bill on professional education. The aim of the bill is to create a system of coordination of professional education for the labour market, and to create appropriate conditions for an entry of employers and their unions to the professional education.

The Ministry of Education also included new members from the field of tourism in a technical commission with the purpose of participating in the creation and innovation of curricula related to tourism.

#### 4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

Maintaining and enhancing community prosperity and the quality of life was positively influenced by favourable economic growth of the Slovak economy accompanied by growth in personal disposable income of the Slovak population in the years past which result, from the tourism point of view, in the development of outbound tourism.

#### 4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

Planned investment construction of tourism facilities is according to the Act No. 24/2006 Coll. assessed from the environmental impact point of view by system EIA (Environmental Impact Assessment) in harmony with EU legislation.

#### 4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

The Ministry of Culture in cooperation with municipalities, towns and self-governing regions initiated the elaboration of operative plans especially for localities, where the objects and localities of cultural heritage are preferred, and the tourism development is a significant part of these localities, including promotion of important cultural points and localities. The localities of cultural heritage got their priority also in a grant programme of the Ministry of Culture. An amount of more than 118 mn SKK was used in 2007 for this purpose.

The Government of the Slovak Republic in its Manifesto for 2006 – 2010 pledged to support acceleration of works relating to the new zoning of protected areas in order to keep the purpose of environmental protection but at the same time to enable commercial activities focused on the development of tourism and to preserve natural and cultural values of the protected areas for the next generations.

The State Nature Protection is developing a project of six programmes for the completion of zoning of natural parks in Slovakia as well as for determination of principles of further utilization of protected areas.

Additionally, the State Nature Protection has built up or renovated 13 information centers of nature protection so far with the aim of improving information system in protected areas and coordinating people visiting these areas so that they do not influence negatively natural values of the areas. In the next period the State Nature Protection plans to restore 5 information centers and build up other 22 centers.

The Ministry of Environment submitted in April 2008 a draft on reevaluation of the NATURA 2000 system of protected areas and areas of European importance for the Government's approval. With this respect the Ministry of Economy in close cooperation with self-governing regions identified collisions between the tourism development interests and interests of NATURA 2000 system protection.

#### 4.1.7 Making holidays available to all. (maximum 200 characters)

Favourable economic growth of the Slovak economy accompanied by decline in unemployment and growth in personal disposable income of the Slovak population in the years past enabled domestic population to increase its participation in tourism activities. At the same time, the development of tourism infrastructure (cycle ways, wellness facilities, etc.) created good conditions for the development of short-term tourist stays. (weekends, etc.).

An intention of the Ministry of Economy is to draw up a study regarding social tourism that means participation of socially poorer groups of population in tourism with special orientation on physically handicapped citizens. The aim is to create economic tools as well as suitable technical conditions in tourism facilities and destinations.

The Ministry of Economy of the Slovak Republic prepared in 2009 for the introduction **a system of recreation vouchers** in Slovakia as an important tool of supporting domestic tourism in accordance with the New Tourism Development Strategy and the State Tourism Policy of the Slovak Republic adopted by the Slovak Government in 2007. The aim of this measure was to stimulate domestic tourism demand, to make tourism more accessible to domestic population and especially to socially disadvantaged groups of society, to increase the participation of domestic people in tourism activities and to enhance the occupancy rate in Slovak accommodation facilities. The recreation vouchers, applicable in Slovak tourist resorts and distributed to employees by their employers, were designed by the Ministry of Economy to bolster domestic tourism during the economic crisis. However, the Slovak Government has not approved the proposed system yet, because of a negative standpoint of the Association of Towns and Municipalities of Slovakia (ZMOS), which has some remarks concerning tax revenues.

#### 4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

On January 1, 2009, Slovakia adopted the common European currency **Euro (EUR)** and thus became the 16th country in the Euro zone.



**4.3** Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

## **5. MECHANISMS FOR IMPLEMENTATION**

Three mechanisms for implementing the Agenda were identified in the “Agenda”: sustainable destinations, sustainable businesses and responsible tourists.

**5.1 Sustainable destinations:** What support is given to strengthen destination management at the regional/destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

The New Tourism Development Strategy in Slovakia until 2013 contains a task to create conditions for regular system support of so-called regardful forms of tourism which have no adverse effects on nature and land – establishing of trekking cycle tracks (local, regional and international) and basic cycling infrastructure, support development of rural areas tourism, eco-tourism, mountain sports, agro-tourism, support of watermanship and sailing sports at waters, support of horseback riding, golf tourism, to increase the comfort of camping sites and grounds, renew marked network of tourist paths, creation of resting places and sheds, etc.

Also the State Tourism Policy of the Slovak Republic supports such forms of tourism that are considerate to the environment (rural tourism, agro-tourism, staying out in the open, riverside holidays, cycling on reinforced and marked routes, horse riding, golf, environmental tourism, etc.).

The Ministry of Economy initiated the preparation of a system integrated project “Regional development tourism centers” which is focused on building capacities of organizational structures in regions for tourism management. The aim of the project is improving destination management, creating regional products, establishing expert team within each self-governing region, improving management and coordination of tourism on regional level, and connecting private and public sector in a more effective.

**5.2 Sustainable businesses:** What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

During the programming period 2008 - 2013 Slovakia can use European funds for the support of business activities in tourism within the Operational Programme Competitiveness and Economical Growth – Priority Axis - Tourism. The Tourism priority axis, with the objective of “Growth of Tourism Industry Competitiveness and Performance”, is focused on the use of the existing potential for the development of sustainable tourism with the aim to ensure innovation, sustainability, and to support employment in the regions. The purpose of the measure “Support of business activities in tourism” is the tourism competitiveness growth in the field of services provided. The criterion of the tourism sustainability is included in the criteria for evaluation of projects submitted within the EU Structural Funds Programmes.

**5.3 Responsible tourists:** What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

The Ministry of Economy of the Slovak Republic translated into Slovak language and published on its official website the UNWTO Global Code of Ethics for Tourism which sets a frame of reference for the responsible and sustainable development of world tourism. The Code helps minimize the negative impacts of tourism on the environment and on cultural heritage while maximizing the benefits for residents of tourism destinations.

## 6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators<sup>2</sup>. These are mainly related to the aim of ‘economic prosperity’.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

## 7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

Several **tourism clusters** were set up in Slovakia in 2009, e.g. cluster Turiec, Orava or the first spa cluster – Balnea Cluster Dudince. The purpose of these clusters is to create a positive image and to organize joint tourism marketing and joint offer of tourism products and to promote common interests in developing tourism.

### **The impact of the global financial and economic crisis on tourism and national responses**

The Ministry of Economy of the Slovak Republic established in November 2008 the Monitoring committee of global crisis impacts on entrepreneurs. The main task of the committee is to monitor the current situation in the financial and economic crisis impacts on small and medium-sized enterprises, particularly in the field of employment, effectiveness of management, sales possibilities, export capability, etc. and to propose and recommend specific measures to minimize possible negative impacts of the financial and economic crisis on the economy.

The Slovak Government approved in February 2009 the package of measures aimed at reducing the impact of the economic crisis. The package comprises also a measure which influences tourism – a territorial limitation of holiday stays of state or public “force organs” (police, army) and pensioners paid from the state budget exclusively on the territory of the Slovak Republic. This measure is to support domestic tourism by better using of existing capacities and to increase domestic consumption.

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<sup>2</sup> These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

The Slovak Tourist Board launched on 31 March 2009 an online survey on the impacts of the global economic crisis on the tourism industry in Slovakia. More than 2 000 entrepreneurs dealing in tourism have been questioned (hotels of medium and higher category, boarding houses, restaurants, spas, thermal swimming pools, aquaparks, ski resorts, travel agencies and touroperators). The outcomes of the survey assist the Slovak Tourist Board with more operational decision-making in searching for the most appropriate form of promotion of Slovakia and its regions at home and abroad as well.

## ANNEX

STATISTICS ON TOURISM IN SLOVAKIA IN 3<sup>rd</sup> QUARTER 2008/2007

INDICATOR	1-3Q. 2007	1-3Q. 2008	INDICES 08/07
<b>International Tourism Receipts (mil. SKK)</b>	<b>36 564,6</b>	<b>39 642,8</b>	<b>108,4</b>
(mil. USD)	1448,2	1 907,9	131,7
(mil. EUR)	1078,7	1 254,5	116,3
<b>International Tourism Expenditures (mil. SKK)</b>	<b>28 989,40</b>	<b>34 183,1</b>	<b>117,9</b>
(mil. USD)	1148,2	1 645,2	143,3
(mil. EUR)	855,2	1 081,7	126,5
<b>Balance of International Tourism (mil. SKK)</b>	<b>7 575,20</b>	<b>5 459,6</b>	<b>72,1</b>
(mil. USD)	300	262,8	87,6
(mil. EUR)	223,5	172,8	77,3
<b>Share of International Tourism Receipts on GDP (%)</b>	<b>2,7</b>	<b>2,6</b>	<b>97,3</b>
<b>Share of Int. Receipts on Export of Services (%)</b>	<b>28,6</b>	<b>29,8</b>	<b>104,1</b>
<b>Share of Int. Receipts on Export of Goods (%)</b>	<b>3,6</b>	<b>3,5</b>	<b>96,3</b>
<b>Share of Int. Receipts on Export (Goods &amp; Services) (%)</b>	<b>3,2</b>	<b>3,1</b>	<b>97,0</b>
<b>Total Number of Tourists /Accommodated Visitors/</b>	<b>2 927 794</b>	<b>3 246 544</b>	<b>110,9</b>
of which: Foreign	1 359 091	1 458 710	107,3
Domestic	1 568 703	1 787 834	114,0
<b>Total Number of Nights</b>	<b>9 278 828</b>	<b>10 198 254</b>	<b>109,9</b>
of which: Foreign	4 315 408	4 453 520	103,2
Domestic	4 963 420	5 744 734	115,7
<b>Average Length of Stay (Nights)</b>	<b>3,2</b>	<b>3,1</b>	<b>98,2</b>
of which: Foreign	3,2	3,1	95,4
Domestic	3,2	3,2	101,6
<b>Total Number of Accommodation Establishments</b>	<b>3 124</b>	<b>3 478</b>	<b>111,3</b>
of which: Hotels, Motels, Boatels	563	598	106,2
Boarding Houses	658	719	109,3
Tourist Residences	373	368	98,7
Cottage Colonies	77	73	94,8
Other Collective Establ. (Camping and Others)	945	1 037	109,7
Private Accommodation	508	683	134,4
<b>Total Numbers of Rooms</b>	<b>56 511</b>	<b>59 500</b>	<b>105,3</b>
of which: Hotels, Motels, Boatels	23 818	25 169	105,7
Boarding Houses	8 155	8 747	107,3
Tourist Residences	6 819	7 203	105,6
Cottage Colonies	1 921	1 715	89,3
Other Collective Establ. (Camping and Others)	13 916	14 133	101,6
Private Accommodation	1 882	2 533	134,6
<b>Total Number of Bed places</b>	<b>146 647</b>	<b>156 537</b>	<b>106,7</b>
of which: Hotels, Motels, Boatels	54 795	58 503	106,8
Boarding Houses	20 958	22 938	109,4
Tourist Residences	20 434	21 452	105,0
Cottage Colonies	7 312	6 783	92,8
Other Collective Establ. (Camping and Others)	37 680	39 503	104,8
Private Accommodation	5 468	7 358	134,6

\*) data are not published yet

### FOREIGN TOURISTS IN ACCOMODATION ESTABLISHMENTS IN 3rd QUARTER 2008/2007

COUNTRY	1. 1.- 30. 9.	TOURISTS	INDICES 08/07	NIGHTS	INDICES 08/07	AVER AGE LEGT H OF STAY	INDICES 08/07	SHARE OF TOURIS. (%)	SHARE OF NIGHTS (%)
BELGIUM	2008	13 492	101,7	33 822	98,1	2,5	96,2	0,92	0,76
	2007	13 261		34 460		2,6		0,98	0,80
BULGARIA	2008	4 929	110,5	13 053	106,6	2,6	96,4	0,34	0,29
	2007	4 460		12 250		2,7		0,33	0,28
<b>CZECH REPUBLIC</b>	<b>2008</b>	<b>444 175</b>	<b>109,5</b>	<b>1 461 747</b>	<b>105,6</b>	<b>3,3</b>	<b>96,0</b>	<b>30,45</b>	<b>32,82</b>
	<b>2007</b>	<b>405 463</b>		<b>1 384 688</b>		<b>3,4</b>		<b>29,83</b>	<b>32,09</b>
CYPRUS	2008	1 223	142,4	6 480	131,9	5,3	92,7	0,08	0,15
	2007	859		4912		5,7		0,06	0,11
DENMARK	2008	9 118	74,0	25 886	64,6	2,8	87,3	0,63	0,58
	2007	12 314		40 044		3,3		0,91	0,93
ESTONIA	2008	5 052	93,4	15 090	100,4	3,0	106,3	0,35	0,34
	2007	5 410		15 029		2,8		0,40	0,35
FINLAND	2008	8 598	101,1	20 994	90,0	2,4	89,0	0,59	0,47
	2007	8 501		23 321		2,7		0,63	0,54
FRANCE	2008	36 188	111,3	79 535	115,2	2,2	103,5	2,48	1,79
	2007	32 516		69 033		2,1		2,39	1,60
GREECE	2008	3 663	103,0	8 507	106,7	2,3	103,5	0,25	0,19
	2007	3555		7 974		2,2		0,26	0,18
NETHERLANDS	2008	20 804	87,4	49 938	81,5	2,4	93,3	1,43	1,12
	2007	23 814		61 283		2,6		1,75	1,42
IRELAND	2008	8 151	97,3	17 736	96,9	2,2	99,7	0,56	0,40
	2007	8 377		18 309		2,2		0,62	0,42
LITHUANIA	2008	17 874	82,7	37 374	95,3	2,1	95,8	1,23	0,84
	2007	21 603		39 227		2,2		1,59	0,91
LATVIA	2008	7 663	84,7	19 636	89,7	2,6	105,9	0,53	0,44
	2007	9048		21 901		2,4		0,67	0,51
LUXEMBOURG	2008	455	85,5	994	83,5	2,2	100,0	0,03	0,02
	2007	532		1190		2,2		0,04	0,03
<b>HUNGARY</b>	<b>2008</b>	<b>75 768</b>	<b>101,3</b>	<b>193 104</b>	<b>95,7</b>	<b>2,5</b>	<b>93,9</b>	<b>5,19</b>	<b>4,34</b>
	<b>2007</b>	<b>74 788</b>		<b>201 797</b>		<b>2,7</b>		<b>5,50</b>	<b>4,68</b>
MALTA	2008	495	168,4	1 487	158,5	3,0	94,2	0,03	0,03
	2007	294		938		3,2		0,02	0,02
<b>GERMANY</b>	<b>2008</b>	<b>134 831</b>	<b>96,1</b>	<b>560 335</b>	<b>89,4</b>	<b>4,2</b>	<b>93,0</b>	<b>9,24</b>	<b>12,58</b>
	<b>2007</b>	<b>140 336</b>		<b>626 948</b>		<b>4,5</b>		<b>10,33</b>	<b>14,53</b>
<b>POLAND</b>	<b>2008</b>	<b>260 739</b>	<b>129,8</b>	<b>815 376</b>	<b>127,2</b>	<b>3,1</b>	<b>98,0</b>	<b>17,87</b>	<b>18,31</b>
	<b>2007</b>	<b>200 807</b>		<b>640 953</b>		<b>3,2</b>		<b>14,78</b>	<b>14,85</b>
PORTUGAL	2008	2 206	93,4	4 898	91,2	2,2	97,7	0,15	0,11
	2007	2363		5368		2,3		0,17	0,12
<b>AUSTRIA</b>	<b>2008</b>	<b>49 237</b>	<b>101,9</b>	<b>126 266</b>	<b>99,8</b>	<b>2,6</b>	<b>97,9</b>	<b>3,38</b>	<b>2,84</b>
	<b>2007</b>	<b>48 331</b>		<b>126 550</b>		<b>2,6</b>		<b>3,56</b>	<b>2,93</b>
ROMANIA	2008	16 027	135,5	51 582	153,8	3,2	113,5	1,10	1,16
	2007	11 831		33 545		2,8		0,87	0,78
SLOVENIA	2008	10 300	123,7	17 733	96,1	1,7	77,7	0,71	0,40
	2007	8 325		18 445		2,2		0,61	0,43
SPAIN	2008	14 947	135,8	30 092	124,9	2,0	91,4	1,02	0,68
	2007	11 010		24 096		2,2		0,81	0,56

SWEDEN	2008	12 796	182,3	28 119	172,8	2,2	94,9	0,88	0,63
	2007	7 020		16 272		2,3		0,52	0,38
ITALY	2008	42 951	95,7	89 853	98,6	2,1	103,0	2,94	2,02
	2007	44 884		91 160		2,0		3,30	2,11
UNITED KINGDOM	<b>2008</b>	<b>55 222</b>	<b>109,9</b>	<b>125 086</b>	<b>111,7</b>	<b>2,3</b>	<b>101,7</b>	<b>3,79</b>	<b>2,81</b>
	<b>2007</b>	<b>50 242</b>		<b>112 030</b>		<b>2,2</b>		<b>3,70</b>	<b>2,60</b>
CROATIA	2008	12 773	103,2	29 649	92,0	2,3	89,2	0,88	0,67
	2007	12 382		32 229		2,6		0,91	0,75
ISRAEL	2008	9 047	105,0	53 553	97,9	5,9	93,2	0,62	1,20
	2007	8 614		54 690		6,3		0,63	1,27
JAPAN	2008	10 576	104,7	20 487	128,9	1,9	123,1	0,73	0,46
	2007	10 098		15 896		1,6		0,74	0,37
SOUTH KOREA	2008	20 251	80,9	27 837	73,5	1,4	90,8	1,39	0,63
	2007	25 017		37 887		1,5		1,84	0,88
RUSSIA	<b>2008</b>	<b>21 831</b>	<b>114,1</b>	<b>98 923</b>	<b>97,2</b>	<b>4,5</b>	<b>85,2</b>	<b>1,50</b>	<b>2,22</b>
	<b>2007</b>	<b>19 129</b>		<b>101 745</b>		<b>5,3</b>		<b>1,41</b>	<b>2,36</b>
SWITZERLAND	2008	8 618	90,1	19 339	90,9	2,2	100,0	0,59	0,43
	2007	9 570		21 275		2,2		0,70	0,49
UKRAINE	<b>2008</b>	<b>24 013</b>	<b>85,2</b>	<b>106 988</b>	<b>75,3</b>	<b>4,5</b>	<b>88,4</b>	<b>1,65</b>	<b>2,40</b>
	<b>2007</b>	<b>28 198</b>		<b>142 078</b>		<b>5,0</b>		<b>2,07</b>	<b>3,29</b>
USA	2008	23 787	94,9	53 408	85,4	2,2	90,1	1,63	1,20
	2007	25 077		62 517		2,5		1,85	1,45
FOREIGN TOURISTS TOTAL	<b>2008</b>	<b>1 458 710</b>	<b>107,3</b>	<b>4 453 520</b>	<b>103,2</b>	<b>3,1</b>	<b>96,2</b>	<b>100</b>	<b>100</b>
	<b>2007</b>	<b>1 359 091</b>		<b>4 315 408</b>		<b>3,2</b>		<b>100</b>	<b>100</b>