

Slovak Republic

Tourism in the economy

In 2018, international travel receipts in the Slovak Republic reached EUR 2.7 billion, up 4.7 % from the previous year. This amounts to 3% of GDP and represents 27.6% of service related exports. There was a surplus in the travel balance of payments of EUR 485 million.

In 2018, Slovakia attracted more visitors than in any previous year. Based on accommodation statistics, the total number of inbound tourists increased by 4.3% to 2.3 million in 2018. The five leading international markets are Czech Republic (31.1% of international tourists), Poland (10.0%), Germany (7.9%), Hungary (5.0%) and Austria (4.4%), which together accounted for 58.4% of all international arrivals.

As regards to domestic tourism and according to the TSA, this accounted for 14.5 million trips in 2016, up 12.1% over 2015. Of these trips, 54.0% were overnight.

In total, 18 786 enterprises provided either accommodation or food services in 2018, 4.4% fewer than in 2017. As of the end of December 2018, there were 4 007 establishments providing accommodation services in Slovakia. These establishments offered 170 700 beds. The number of employees in accommodation and catering establishments was 110 700 in 2018, representing 4.3% of the total workforce.

Tourism governance and funding

Responsibility for tourism rests with the Ministry of Transport and Construction. The Tourism Section of the Ministry is divided into three departments covering International Relations and Marketing, State Tourism Policy, and Destination Management. Responsibilities include the preparation of legislation and regulations, strategy formulation, implementation of the Tourism Support Act, gathering statistical data, and the administration of the register of tourism organisations. The Tourism Section is also responsible for marketing and promotion, and has six overseas offices located in the key markets of Czech Republic, Germany, Poland, Austria, Hungary and the Russian Federation.

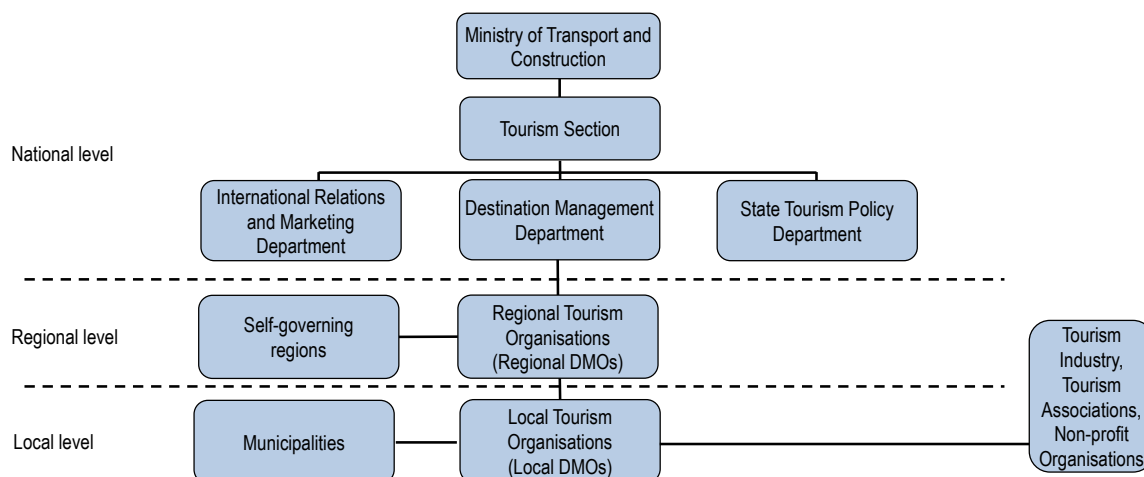
The Ministry co-operates with other ministries through participation in various committees dealing with issues affecting tourism, including the Working Group to Co-ordinate the Presentation of Slovakia Abroad, the Interdepartmental Commission of the Geo-parks Network, the Impact and Adaptation Steering group, and the Working Group of the Government Council for Vocational Education and Training.

Tourism responsibilities are delegated to self-governing bodies in eight regions, while municipalities also play an important role in the development of tourism. Local and regional destination management organisations (DMOs) are responsible for the development of tourism products and promotion. Local DMOs are created by municipalities, tourism business entities, non-profit organisations, foundations and associations with activities in the field of tourism. Regional DMOs are formed by the regional self-governing authorities and at least one local DMO. Currently there are 37 local and 7 regional DMOs operating in Slovakia, funded by subsidies provided by the Ministry, membership fees and other sources.

Representatives of the main nationwide tourism organisations are members of the Slovak Tourism Association, which promotes co-operation in the sector and advises on any legislative changes deemed necessary. Tourism associations contribute at local and regional levels, primarily in the field of quality improvement, professional training and the sharing of best practice.

The Ministerial budget for tourism was EUR 11.6 million in 2018, of which EUR 3.9 million was for marketing and promotional activities, with a further EUR 2.2 million for implementation of sectoral policies. Almost EUR 5.5 million was distributed in the form of subsidies to local and regional DMOs, mainly for product development, tourist infrastructure and marketing.

Slovak Republic: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Transport and Construction, 2020.

Tourism policies and programmes

The Government's main tourism policy aims, as set out in the Manifesto of the Government of the Slovak Republic for 2016-20, are to increase the competitiveness of the sector while creating new jobs across the country. To achieve these goals, it has recognised the need to:

- Consider more flexible forms of employment given the seasonal nature of tourism.
- Improve co-ordination between the rail and bus sectors, and the operators of tourism resorts.
- Present the country as an attractive and safe destination, to encourage visitors and longer stays.
- Encourage destination management through DMOs which in turn actively represent Slovakia.
- Strengthen the development of higher value added, cost-effective tourism products.
- Place more emphasis on support for the development of the spa industry.

In addition to the Manifesto, Slovakia's tourism priorities are set out in two other main policy documents:

- Tourism Development Strategy until 2020, which aims to increase the competitiveness of the tourism sector, balance regional disparities, and create jobs with a focus on two key areas - raising the quality of the tourism offer and promoting Slovakia as a tourism destination.
- Tourism Marketing Strategy 2019-20, which seeks to maximise the economic benefits of tourism by: increasing the volumes and length of stay of both domestic and inbound tourism, and aid efficient utilisation of accommodation capacity; strengthening Slovakia's brand positioning as an attractive tourist destination offering a competitive product; and using major events to raise the awareness of Slovakia's tourism offer.

The priorities and challenges identified in the strategic documents have been addressed by various policy initiatives, including:

- Implementing a destination management approach for tourism development through the Tourism Support Act, which regulates tourism support, including local and regional tourism organisations that receive co-funding support from the state budget for various activities.
- Developing and approving legislation, including to provide subsidies to support the development of cycle tourism in Slovakia, and enact the EU Directive on Package Travel.
- Supporting the development of innovative products, including through funding support provided by the Ministry to local and regional tourism organisations. Recent examples include tourist navigation systems, digital tourist information panels, tourist cards, cyclo-applications, geo-location applications, e-bike products and digital geographic information systems.
- Supporting domestic tourism participation through the implementation of the recreation vouchers initiative (see box).
- Reducing the VAT on accommodation services to 10%, compared to a national rate of 20%.
- Signing a co-operation agreement between the Ministry and the Statistical Office to improve statistics relating to inbound tourism and establish a Tourism Satellite Account.
- Co-operating with the Visegrad Four Group under the common Discover Central Europe brand, which aims to increase joint marketing and promotional activities in overseas markets and to increase visitor numbers from long-haul markets to the 'V4' countries - the Czech Republic, Hungary, Poland and Slovakia.

Trade initiatives have also been undertaken to promote tourism growth. These include the promotion of vocational education and training in the tourism sector, the financing of a study using mobile operators' data to inform evidence-based tourism policy, and the development and implementation of the National Tourist System to ensure a professional presentation of Slovakia as an attractive tourist destination. Additionally, co-operation with the Slovak Ice Hockey Federation was undertaken to realise the potential of the Ice Hockey World Championship held in Slovakia in 2019.

A new Sustainable Tourism Strategy to guide the long-term development of tourism to 2030 is currently being prepared and will consider how to: co-ordinate tourism to support SMART solutions (such as support of data-oriented destination development, and digitalisation of tourism assets) and a whole of government approach; present Slovakia as a tourism destination, and develop products that can best support the development of sustainable tourism, and maximise the protection and conservation of the country's natural and cultural resources while encouraging their development as tourism assets; improve the accessibility of tourism facilities; reduce regional disparities and support the growth of less developed districts by improving connectivity and new products; and increase the skills of workforce in the tourism sector.

The Slovak Republic introduced recreation vouchers, which can be exchanged for domestic accommodation and experiences, thus boosting domestic tourism in Slovakia. Companies employing more than 49 people are required to provide these vouchers to employees who have worked for them for at least 24 months and who have applied for the contribution. The employer contribution equals 55% of eligible costs, to a maximum of EUR 275. The sum is exempt from income tax and deductions for both employees and employers. Recreational vouchers can be used for tourism services connected with accommodation for at least two night stays, or tourism packages comprising accommodation for at least two night stays and catering services or other services related to a recreational stay. Employees can also use the vouchers to pay for holiday camps for their children.

Statistical Profile

Slovak Republic: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	2 253	2 609	2 997	3 213	3 340
Overnight visitors (tourists)	2 253	2 609	2 997	3 213	3 340
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	6 996	7 894	8 993	9 507	9 819
Hotels and similar establishments	6 859	7 703	8 750	9 233	9 501
Other collective establishments	70	89	107	118	128
Private accommodation	67	102	137	156	189
Inbound tourism					
Total international arrivals	1 475	1 721	2 027	2 162	2 256
Overnight visitors (tourists)	1 475	1 721	2 027	2 162	2 256
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Czech Republic	437	510	621	645	702
Poland	158	168	188	210	226
Germany	138	159	178	192	178
Hungary	58	70	91	101	112
Austria	67	82	88	97	100
Nights in all types of accommodation	3 904	4 456	5 145	5 429	5 696
Hotels and similar establishments	3 171	3 642	4 083	4 250	4 351
Other collective establishments	681	743	955	1 067	1 208
Private accommodation	52	72	107	112	138
Outbound tourism					
Total international departures	4 738	5 194	6 336	..	..
Overnight visitors (tourists)	2 760	3 227	3 491
Same-day visitors (excursionists)	1 978	1 968	2 844
Top destinations					
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TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	1 924	2 239	2 538	2 665	2 817
International travel receipts	1 890	2 192	2 483	2 588	2 710
International passenger transport receipts	34	47	55	77	107
Outbound tourism					
Total international expenditure	1 945	2 043	2 186	2 296	2 403
International travel expenditure	1 829	1 917	2 023	2 125	2 225
International passenger transport expenditure	116	126	163	171	178

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077768>

Slovak Republic: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2016	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	28 578	144 129	147 968	147 677	..	..
Accommodation services for visitors	3 257	15 974	16 642	17 357	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	13 823	71 412	73 407	70 997	..	..
Passenger transport	3 855	25 484	26 118	26 804	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	579	1 412	1 302	1 208	..	..
Travel agencies and other reservation services industry	1 410	3 442	3 207	3 254	..	..
Cultural industry	1 589	9 256	9 482	9 777	..	..
Sports and recreation industry	4 065	17 149	17 810	18 280	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077787>

Slovak Republic: Internal tourism consumption

Million EUR

	2016		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	..	..	..
Tourism characteristic products	1 869	2 466	5 290
Accommodation services for visitors	331	412	820
Food and beverage serving services	168	502	671
Passenger transport services	335	403	1 177
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	67	25	92
Travel agencies and other reservation services industry	135	9	144
Cultural services	42	13	330
Sports and recreation services	127	64	296
Country-specific tourism characteristic goods	555	997	1 552
Country-specific tourism characteristic services	110	42	209
Other consumption products	..	..	..
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077806>



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