

Final Report

Slovenia Convention Bureau | Meeting destination Slovenia | Strategy 2025 - 2030 | **PHASE ONE** | The Status Quo

November 2024 to February 2025



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Presented by

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PROJECT | PHASE ONE

- **Profile**

Purpose: **PHASE ONE | Meeting destination Slovenia | The Status Quo**
Client: Slovenia Convention Bureau
Date & Duration: November 2024 to February 2025
Destination: Slovenia

- **Competence Team**

Especially for this occasion, we have formed a unique consulting team to provide you with the best possible solutions for the defined content, scope and scale of this project.

**CARUM RARUM | A unique Consulting team
by ENITED business events, Toleranca marketing and PKF hospitality**

It combines the competencies and skills of three renowned and successful companies, complementing each other in their local and international expertise.

All three companies are actively and ongoingly involved in the Slovenia tourism and business events sector, bringing their up-to-date knowledge, their vast experiences and their established networks into the possible collaboration. All for your benefit.

Through our established ENITED network of Excellence, we have selected and formed this unique consulting team to perform the requested consulting services and to share our custom-tailored solutions.

Our team of 3 key experts.

- ✓ **Mr. Ivo J. Franschitz** | [LinkedIn Profile](#)
International Business Events & Live Communication expert
- ✓ **Mr. Gorazd Cad** | [LinkedIn Profile](#)
International Destination Marketing expert
- ✓ **Mr. Tomislav Čeh** | [LinkedIn Profile](#)
International Tourism & Hospitality expert

The combination of their core competence & expertise will be the best fit in delivering the expected solutions and results.

These 3 people will be your dedicated project managers and Mr. Ivo J. Franschitz is your lead/main contact person throughout the project.

For the purpose of clarity & understanding, we will refer to our business events sector as the **Meeting industry** and **Meeting destination** in this project.

The Word **Meeting** defines the general purpose of our sector and stands for “**Bringing People together to meet and creating Live communication opportunities**”.

- Key Points, Elements & Outcome

1. Analysis and review of the current state of the meetings industry in Slovenia.

An overview of the meetings industry using three comparative tools.

Outcome: A complex 360-degree analysis of all segments of the meetings industry in Slovenia by region and product.

Both the quantitative and qualitative data will serve as the basis for the subsequent phases of the project and the foundation for creating the strategic guidelines.

2. Analysis of the market potential of the meetings industry in Slovenia compared to the international market.

We analyzed the international market, identified general main trends and defined general key market potentials for the Slovenian meeting industry for 2025 to 2030.

Outcome: Definition of the key market potential of the Slovenian meetings industry and the general identification of future key international markets which the Slovenian meeting industry will focus on.

The profiles of key market potential provide the basis for preparing the strategy and organizing the workshops.

3. Analysis of the perception of Slovenia as a destination suitable for MICE from the point of view of foreign event organizers.

Implementation of an online survey on the perception of Slovenia among foreign event organizers.

Outcome: A total of 342 surveys completed with a representative international sample of event organizers.

Gaining a better understanding of clients' relations, characteristics and benefits, which will be incorporated in the communication plan.

4. Analysis of the expectations of stakeholders in the Slovenian meetings industry.

We conducted personal interviews with key stakeholders from 6 Slovenian key regions.

Outcome: A total of 24 personal interviews.

Collecting the regional expectations of stakeholders at the strategic and operative level, and their goals, which is the basis for the preparation of strategy and action plans.

EXECUTIVE SUMMARY | PHASE ONE

Following, we have prepared an executive summary of PHASE ONE.

1. Analysis and review of the current state of the meetings industry in Slovenia.

An overview of the meetings industry using three comparative tools.

- 1.1. Comparison of the competitiveness of Slovenia's destination in the 6 key regions, as well as an overall comparison of Slovenia with four destinations in Europe: Austria, Croatia, Denmark and Estonia.
- 1.2. Assessment of the current offer of the Slovenian meeting industry by 4 event products
- 1.3. Analysis of the demand for the Slovenian meetings industry for the period from 2018 to 2023
- 1.4. Analysis of the direct tourism impact of the meeting industry among KUS members for the period of 2018 to 2023

Outcome: A complex 360-degree analysis of all segments of the meetings industry in Slovenia by region and product.

Both the quantitative and qualitative data will serve as the basis for the subsequent phases of the project and the foundation for creating the strategic guidelines.

First Analysis & Recommendations | "Pushing boundaries!"

Based on the comparative analysis of Slovenia's competitiveness against Austria, Denmark, Estonia, and Croatia, we can conclude that Slovenia has matured as a destination. This means it can no longer rely on being a "new, green, and undiscovered destination," which had been the central marketing narrative in the past.

The period of enthusiasm has undoubtedly ended, and as a serious industry and one of the key sectors within the definition of Slovenian tourism, there is much work ahead to achieve global competitiveness. The business event destination Slovenia must double down on improving the quality of its offer.

All areas identified for improvement in our research are interconnected and require substantial investments in knowledge, products, marketing, and development.

2. Analysis of the market potential of the meetings industry in Slovenia compared to the international market.

We analyzed the international market, identified general main trends and defined general key market potentials for the Slovenian meeting industry for 2025 to 2030.

- 2.1. Analysis of market potential by MICE segments in at least three selected international target markets and client behavior in these markets, based on the results of a separate survey among KUS members, which was conducted by the contractor.

Outcome: Definition of the key market potential of the Slovenian meetings industry and the general identification of future key international markets which the Slovenian meeting industry will focus on.

The profiles of key market potential provide the basis for preparing the strategy and organizing the workshops.

First Analysis & Recommendations | “Focusing on the doable.”

During the already mentioned period of dynamic marketing (2010-2020), the meeting destination Slovenia has gained visibility & recognition on the international market, building a strong brand for the emerging sustainability topic and became a trend-setting destination.

Nowadays, Slovenia is considered an established and to a certain extent mature destination, with room for improvement in quality and variety of their product & services.

Hence, there is no need to “re-invent the wheel”, but to build on that recent success story, starting and adding a new chapter over the next 5 years.

It's time to continue with a more focused and sharpened market approach & message by taking into consideration the real purpose of the meeting industry and what's doable in the end.

That means the future definition of potential markets is not done anymore by the approach to fill the current tourism infrastructure by extending the tourism/hospitality offering to another potential “tourism” market segment.

Instead, it should be defined by matching future business events' purpose & content with the city or/and country development (e.g., leading sectors of business/industry and of knowledge) and the created meeting destination brand.

To create and develop the new destination brand and to (re)define the matching future markets is part of the purpose & tasks of this Strategy 2030 project, in the following steps.

3. Analysis of the perception of Slovenia as a destination suitable for MICE from the point of view of foreign event organizers.

We conducted an online survey reaching out to the international business events client's market. A total of 342 surveys have completed with a representative international sample of event organizers.

- 3.1. Implementation of an online survey on the perception of Slovenia among foreign event organizers.

Outcome: A total of 342 surveys completed with a representative international sample of event organizers.

Gaining a better understanding of clients' relations, characteristics and benefits, which will be incorporated in the communication plan.

First Analysis & Recommendations | “Listening to the market.”

Slovenia is distinguished by its natural beauty, sustainability leadership, and authentic cultural experiences, offering a boutique, accessible, and eco-friendly alternative to more mainstream European destinations.

The Slovenian Convention Bureau has made strong strides, but continued efforts in familiarization trips, improved accessibility, and global marketing are essential. By promoting Slovenia's regional diversity, sustainability, and unique experiences, the bureau can position Slovenia as a competitive and desirable destination for business events.

4. Analysis of the expectations of stakeholders in the Slovenian meetings industry.

We conducted a total of 24 personal interviews with key stakeholders from 6 Slovenian key regions. The interviews, moderated by Gorazd Čad and Ivo J. Franschitz explored the current state and future vision of the Slovenian meetings industry.

4.1. Personal interviews with local/regional/national key stakeholders.

Outcome: A total of 24 personal interviews.

Collecting the regional expectations of stakeholders at the strategic and operative level, and their goals, which is the basis for the preparation of strategy and action plans.

First Analysis & Recommendations | “Working together.”

While the known & obvious topics (e.g., lack of general accessibility, the need for improved & new infrastructure, the desire for increased capacities) have been mentioned by some of the stakeholders, most of the interviewees expressed a positive and very realistic analysis of the current state of the meeting industry in Slovenia.

The stakeholders understand the potential of the meeting industry (business events sector) and their approach towards further development & growth is based on a proactive attitude.

The defined future key success factors are a more inclusive collaboration between all Slovenian regions, a need for a better understanding for the meeting industry’s potential beyond the core stakeholder circle, and a change of mindset and more focus on the “doable” rather than on the “wishful”.

FINAL REPORT | PHASE ONE

In an in-depth analysis and with an inclusive approach, we engaged with both local/regional/national stakeholders in Slovenia and international clients/experts to establish a clear and current status of the meeting industry in Slovenia.

“Where is the Slovenian meetings industry headed?”

In aviation, it is nearly impossible to imagine flying without a multitude of instruments and the triple-layered flight control system that includes the pilot, co-pilot, and air traffic control. Managing meeting destinations can easily be compared to flying an aircraft. Much like aviation, it is an incredibly complex activity dependent on numerous factors, making it impossible to navigate by intuition alone.

Nevertheless, many destinations fly blind, relying solely on their instincts. It was precisely for this reason that Toleranca marketing developed the MEETING EXPERIENCE INDEX, an analytical tool designed to provide destinations with a reliable instrument for more precise navigation through turbulent and unpredictable times.

This year's comparative analysis of Slovenia is the third in the series. The first was conducted in 2019, followed by the second in 2021, while the latest analysis assesses the post-pandemic situation.

In the inaugural study, which examined data from 2018, the aircraft named Slovenia was rapidly ascending. Slovenia was considered the star of New Europe, outperforming local competitors.

However, over the years, shortcomings became increasingly apparent, manifesting in a lack of strategic investment, declining recognition, and other systemic challenges. As a result, in the post-pandemic period, Slovenia has lost its competitive edge and begun to fall behind in key areas of competitiveness.

This current, comparative study aims to enable Slovenia's meetings industry to move beyond mere intuition and develop an effective strategy positioning Slovenia at the forefront of New Europe by 2030, and among the top 30 destinations in the ICCA rankings. We firmly believe this goal is achievable, but only through deliberate and highly targeted investments in our industry.

What truly matters, however, is the knowledge and experience the Slovenian meeting industry has accumulated over more than 30 years, as well as the exceptional projects that must be recognized and not overshadowed by various interests.

No journey is without its setbacks, wrong turns, or difficulties. These challenges are of great value, as they offer valuable lessons. Thus, we perceive the identified weaknesses as new opportunities for Slovenia.

In PHASE ONE, let our research mark the beginning of a new journey for Slovenia, one that holds extraordinary potential for the future.

1. Analysis and review of the current state of the meetings industry in Slovenia.

An overview of the meetings industry using the following three comparative tools.

1.1. Comparison of the competitiveness of Slovenia's destination in the 6 key regions, as well as an overall comparison of Slovenia with four destinations in Europe: Austria, Croatia, Denmark and Estonia.

✓ Sample for the comparison

The analysis included 54 destinations from five countries (Austria, Croatia, Denmark, Estonia, and Slovenia). A detailed analysis of the compared destinations has shown that the sample is sufficiently extensive to provide a reliable and credible assessment of the current situation.

The four European destinations were selected together with the Slovenia Convention Bureau (CB) and provided the right mix of "leading" and "developing" destinations, with a comparable size, scope & scale.

✓ The comparison is divided into two sections:

- A general comparison of Slovenia's competitiveness
- A comparison of the competitiveness of key Slovenian destinations

IMPORTANT: Competition in the international event market typically does not occur directly between countries but primarily at the city or micro-destination level (except for major sports or state events).

For the sake of credibility, the comparison also includes an assessment of the competitiveness of individual compact micro-destinations for events, as understood by event organizers.

Evaluating destinations solely from a national perspective does not suffice, as it limits the ability to identify key trends by focusing on individual destinations. Through product comparison, we gained more comprehensive and credible analysis, serving as an excellent foundation for further work with destinations in the second phase.

✓ Slovenian destinations

Only Ljubljana qualifies as a globally competitive destination among the 21 Slovenian destinations. Five (Maribor, Bled, Portorož, Kranjska Gora, and Bohinj) compete regionally. The majority, however, are competitive only on a regional or local level and have yet to reach their full potential.

✓ Untapped potential:

There are places in Slovenia that are not yet fully exploiting their potential. Notable examples include Kamnik, Novo Mesto, and Slovenj Gradec. Laško, the Savinja Valley, and the Green Karst region also show untapped potential.

Comparison of Slovenia's competitiveness as a COUNTRY destination

Summary of overall ratings for the compared country destinations before and after the pandemic

	CRITERIA	AUSTRIA	DENMARK	ESTONIA	CROATIA	SLOVENIA
Before COVID	FINAL RATING OF COMPARED DESTINATIONS 2019	4.15	4.00	3.77	3.51	3.47
After COVID	FINAL RATING OF COMPARED DESTINATIONS 2024	4.19	4.02	3.79	3.67	3.61
	DIFFERENCE IN RATINGS 2019 - 2024	+0.04	+0.02	+0.02	+0.16	+0.14
	DIFFERENCE BETWEEN SLOVENIA AND OTHER DESTINATIONS 2024	-0.58	-0.39	-0.18	-0.06	

Summary of overall ratings for the compared city destinations before and after the pandemic

	CRITERIA	AUSTRIA	DENMARK	ESTONIA	CROATIA	SLOVENIA
	LEADING CITY	Vienna	Copenhagen	Tallinn	Zagreb	Ljubljana
Before COVID	FINAL RATING OF LEADING DESTINATIONS 2019	4.76	4.72	4.41	4.42	4.43
After COVID	FINAL RATING OF LEADING DESTINATIONS 2024	4.81	4.82	4.51	4.53	4.51
	DIFFERENCE IN RATINGS 2019 - 2024	+0.05	+0.10	+0.10	+0.11	+0.08
	DIFFERENCE BETWEEN SLOVENIA AND OTHER DESTINATIONS (2024)	-0.30	-0.31	+0.00	-0.02	

✓ **Balanced criteria**

The compared destinations **are relatively equal** in terms of natural and cultural factors, general and transport infrastructure, and subjective destination evaluations.

✓ **Comparison of the pre- and post-pandemic period**

Austria maintains a high score (4.19), the highest among the compared destinations. Denmark has slightly improved its score (+0.02) and continues to hold a strong position (4.02). Both countries compete in the top tier of the market.

Estonia remains stable and highly competitive, directly rivalling Slovenia and Croatia. Croatia has significantly improved its position, primarily due to several investments in hotel infrastructure. The same applies to Slovenia, although it still lags the compared destinations.

Although Slovenia's gap with other destinations is narrowing, its progress is slower compared to most countries, particularly Austria and Denmark.

✓ **Power Index**

Using the Power Index, we assessed the **key strengths and weaknesses** of the destinations on a scale of 1 to 5.

Results from 2017 to 2024 show that Austria (+0.69), Denmark (+0.49), Estonia (+0.27), and Croatia (+0.05) have outperformed Slovenia, reflecting the market's reality.

✓ **Key strengths of compared destinations**

Slovenia still falls behind in areas such as conditions for association events (ICCA Index, with Austria and Denmark leading), congress infrastructure, air connectivity (ACI Airport Connectivity Index), destination marketing, and tourism infrastructure.

✓ **Banquet capacity challenge**

81% of Slovenian destinations have insufficient banquet capacities. Larger destinations such as Maribor, Portorož, Kranjska Gora, and Ljubljana particularly stand out. Banquet capacity represents one of the most significant challenges for Slovenian congress destinations, limiting the ability to host certain types of events.

✓ **Slovenia's carrying capacity**

Slovenia falls short in nearly all capacity areas. For example, event organizers can utilize only 32.48% of the maximum theatre-style capacity of four compared destinations (1,552 participants).

A key takeaway of the study is that improving the carrying capacity of Slovenia's key destinations would significantly improve competitiveness. Slovenia could thus host events with higher added value.

✓ **Slovenia's key advantage**

A high safety index and indicators of quality of life for residents and event participants.

Comparison of the competitiveness among INDIVIDUAL destinations

✓ CATEGORY L | Destinations that can host up to 2,000 event participants

The comparison included Zagreb (4.53), Ljubljana (4.51), Tallinn (4.51), Salzburg (4.44), and Graz (4.33).

The **key advantages of LJUBLJANA** as the only Slovenian L-category destination are

- a) **KUL Consortium** | A professional and connected meetings industry.
- b) **Planet Positive Event** | A concrete solution for the regenerative organisation of events.
- c) **CD and GR** | High-quality congress infrastructure with two convention centres.
- d) **Conventa** | The only regional B2B platform based in Ljubljana.
- e) **KUL 27 Strategy** | One of the few destinations with a clear development and marketing strategy.

✓ CATEGORY M | Destinations that can host up to 1,200 event participants

The comparison included Dubrovnik (4.39), Maribor (4.33), Bled (4.20), Rovinj (4.20), Saalfelden (4.20), Portorož (4.19), Opatija (4.18), Klagenfurt (4.12), Aalborg (4.08), and Celje (4.02).

The **key advantages of urban destinations MARIBOR and CELJE** in the M category are

- a) **Favorable geostrategic location** | Easy access and proximity to three airports.
- b) **Wine and thermal experiences** | Unique green, thermal, and wine experiences.
- c) **University of Maribor** | Opportunities for scientific congresses.
- d) **Fresh energy** | Newly discovered Slovenian destinations.
- e) **Fifteen-minute cities** | Compact cities that are easily accessible.

The **key advantages of the coastal destination PORTOROŽ** in the M category are

- a) **Europa Congress Hall** | The largest congress center on the Adriatic.
- b) **Traditional and cyclical events** | A rich base of regular clients.
- c) **Original incentive experiences** | Developed incentive products and teambuilding programs.
- d) **Climatic health resort** | A tradition of climatic health resorts and high-quality living.
- e) **International recognition** | An established destination with numerous references.

The **key advantages of the Alpine destination BLED** in the M category are

- a) **Easy accessibility** | Close proximity to Ljubljana Airport.
- b) **Innovative incentive programs** | Unique experiences in the heart of Triglav National Park.
- c) **Active tourist board** | High level of professionalism and proactivity.
- d) **High quality of living** | Peaceful and human-centered environment.
- e) **Special venues** | Unforgettable settings for events, such as Bled Castle.

✓ **CATEGORY S | Destinations that can host up to 600 event participants**

The comparison included Schladming (4.21), Kranjska Gora (4.14), Mali Lošinj (4.10), Rogaška Slatina (4.09), Podčetrtek (4.08), and Parnu (3.93).

The **key advantages of the Alpine destination KRANJSKA GORA** in the S category are

- a) **Boutique experience** | Authentic Slovenian Alpine experience.
- b) **Planica** | The world-famous Nordic Centre Planica.
- c) **Original teambuilding events** | Unique teambuilding and incentive programmes.
- d) **Triple border** | Excellent geographical location.
- e) **Slovenian cuisine** | Modern, award-winning cuisine that adds distinction to events.

The **key advantages of spa destinations ROGAŠKA SLATINA and PODČETRTEK** in the S category are

- a) **Year-round destinations** | Ideal for events regardless of the season.
- b) **Spa tradition** | Unique spa heritage and Donat MG.
- c) **Sustainable and boutique offerings** | Sustainability is confirmed by certificates.
- d) **Local charm** | Some of the most unique venues, such as Orhidelia and the Crystal Hall.
- e) **Personalized approach** | Intimate and adaptable experience supported by local hospitality.

For further detailed information on PHASE 1.1., please refer to the enclosed document “Comparison of the competitiveness of Slovenia + Assessment of the current offer of the Slovenian meetings industry (SI | Slovenian language)” | Sections B and C.

1.2. Assessment of the current offer of the Slovenian meeting industry by 4 event products

✓ Selected 4 event products

The assessment focuses on the following four main event products within the international business events market.

- Corporate Events
- Association Events
- Incentive Events
- Government (Public Sector) and Political Events

Summary of overall ratings for the compared country destinations

PRODUCT	AUSTRIA	DENMARK	ESTONIA	CROATIA	SLOVENIA
CORPORATE EVENTS	4.68	4.73	4.58	4.60	4.54
ASSOCIATION EVENTS	4.61	4.67	4.56	4.46	4.43
INCENTIVE EVENTS	4.79	4.79	4.72	4.76	4.70
GOVERNMENT AND POLITICAL EVENTS	4.77	4.77	4.69	4.67	4.63
TOTAL	4.71	4.74	4.64	4.62	4.58

Slovenia lags the four competing destinations in all products.
The current state compared to other four destinations is as follows

- -0.11 Corporate Events
- -0.15 Association Events
- -0.07 Incentive Events
- -0.09 Government and Political Events

✓ CORPORATE Events

• Strengths of Slovenia

- Excels in safety, the hospitality of locals, and natural/experiential diversity.
- One of the best quality-to-price ratios compared to other countries.
- High levels of sustainability and quality of life.

• Weaknesses of Slovenia

- Congress infrastructure (hotels, event venues) trails behind countries like Austria and Denmark.
- Accessibility (air and rail) remains limited compared to leading destinations.
- Lack of more diverse offerings in nightlife, gastronomy, and destination activities/experiences.

• Recommendations to improve Slovenia's competitiveness

- Upgrade the quality of event venues and 4-5-star hotels.
- Improve air and rail connectivity.
- Increase focus on quality nightlife and destination activities/experiences.
- Promote Slovenia as a sustainable destination with unique natural experiences.

✓ ASSOCIATION Events

• Strengths of Slovenia

- Stands out with safety, sustainability, and a favorable value-for-money ratio.
- Suitable for smaller and medium-sized events where intimate atmospheres and natural diversity are important.
- Ljubljana (4.80) is the most competitive destination due to its quality infrastructure and accessibility.

• Weaknesses of Slovenia:

- Congress infrastructure (hotels and convention centers) lags behind most competing countries.
- Lower international awareness & recognition, as reflected in the ICCA ranking (41st place with 67 congresses).
- Poorer air and rail connectivity compared to Austria and Denmark significantly reduces competitiveness.

• Recommendations to improve Slovenia's competitiveness

- Invest in quality convention centers (at least two halls with an area of 3,000 m²) and higher-category hotels.
- Intensify Slovenia's promotion as a destination for association events and strengthen the ambassador/influencer program.
- Enhance air and rail connectivity.
- Introduce value-in-kind support for event organizers.

✓ INCENTIVE Events

• Strengths of Slovenia:

- Exceptional natural and regional diversity (including Bled, Bohinj and Portorož).
- Sustainability and safety as key attributes.
- One of the best quality-to-price ratios compared to competing countries.
- Rich culture, gastronomy, and outdoor experiences.

• Weaknesses of Slovenia:

- Congress infrastructure (e.g., 4–5-star hotels) lags behind Austria and Denmark.
- Lower international awareness & recognition as an incentive destination.
- Limited offerings in nightlife and incentive activities/experiences.

• Recommendations to Improve Slovenia's Competitiveness

- Invest in higher-category hotels and increase the capacity of congress spaces.
- Enhance Slovenia's international recognition as a sustainable and safe destination for incentive events.
- Improve nightlife offerings and develop creative incentive experiences.
- Continue promoting sustainable tourism as a competitive advantage.

✓ **GOVERNMENT and POLITICAL Events**

- **Strengths of Slovenia:**
 - Safety (4.95) and political stability (4.83) are among their key competitive advantages.
 - Sustainability and natural attractiveness enable events with lower environmental impacts.
 - A favorable quality-to-price ratio (4.77) attracts organizers with limited budgets.
 - Hospitality and a pleasant natural environment are additional attributes for boutique and more intimate events.
- **Weaknesses of Slovenia:**
 - Event venue infrastructure (hotels and event spaces) lags behind Austria, Denmark, and Estonia.
 - Air connectivity (4.52) and airport facilities (4.45) limit the ability to attract larger international events.
 - Lower global awareness & recognition, especially for large-scale events.
- **Recommendations to improve Slovenia's event products**
 - a) Invest in modern convention centers and higher-category hotels.
 - b) Strengthen air connections and improve airport facilities.
 - c) Increase international promotion of Slovenia as a destination for governmental events.
 - d) Improve additional services, such as nightlife and prestigious restaurants.

For further detailed information on PHASE 1.2., please refer to the enclosed document “Comparison of the competitiveness of Slovenia + Assessment of the current offer of the Slovenian meetings industry (SI | Slovenian language)” | Section D.

First Analysis & Recommendations | “Pushing boundaries!”

Based on the comparative analysis of Slovenia’s competitiveness against Austria, Denmark, Estonia, and Croatia, we can conclude that Slovenia has matured as a destination. This means it can no longer rely on being a “new, green, and undiscovered destination,” which had been the central marketing narrative in the past.

In this context, the development of Slovenia’s meetings industry can be divided into the following periods

- 1991–2001 | The romantic period of re-establishing the industry
- 2001–2010 | The period of establishing the Slovenian Convention Bureau and launching Conventa
- 2010–2020 | The period of dynamic marketing of Slovenia as a rising European star
- 2020–2022 | The COVID-19 pandemic period
- 2023–2030 | The period of seeking a new identity and mature development

At first glance, these periods do not seem directly related to the findings of the comparative analysis. However, upon closer examination, it becomes evident that during the period of dynamic marketing, Slovenia achieved results that often exceeded its actual capabilities.

That was confirmed by a similar analysis conducted for Ljubljana in 2022. Looking at Slovenia’s ranking on the ICCA (International Congress and Convention Association) list, Slovenia consistently ranked 44th globally between 2009 and 2019, hosting an average of 60 qualified congresses annually. The year 2019, just before the pandemic, stood out with Slovenia hosting 83 congresses. The first post-pandemic year brought the number closer to the long-term average, with 67 congresses.

The period of enthusiasm has undoubtedly ended, and as a serious industry and one of the key sectors within the definition of Slovenian tourism, there is much work ahead to achieve global competitiveness. The business event destination Slovenia must double down on improving the quality of its offer.

All areas identified for improvement in our research are interconnected and require substantial investments in knowledge, products, marketing, and development.

Within the context of a traditional understanding of Slovenia’s meetings industry marketing ecosystem, the research findings can be summarized using the 10 Ps. This approach serves as a suitable foundation for the second phase of the strategy.

P1 | Product

Product analysis has shown Slovenia trails behind in all four areas. The most critical gaps are in association events (-0.58) and corporate events (-0.43), which constitute the majority of Slovenia’s meetings industry revenue. Slightly better performance was recorded in incentives (-0.26) and governmental and political events (-0.38). The strategy must thus dedicate significant attention to defining the product portfolio.

P2 | Price

The quality-to-price ratio was assessed as good and, in some destinations, excellent. However, we recommend the Slovenian Convention Bureau conduct an additional price competitiveness analysis of Slovenia’s products as part of the project, as pricing is a crucial aspect of competitiveness. In some areas, Slovenia may already be nearing the limit of market acceptability.

P3: Place (distribution)

It is essential to align markets precisely with the product goals of individual destinations. In other words, new product-market diversification and subsequent localization (e.g., tailoring incentive products to specific markets) are necessary.

P4 | Promotion

The research does not directly address this question. However, Estonia serves as a good practice example for digital marketing, Denmark for transformative marketing, and Austria for consistency and market positioning.

In all three cases, the marketing is highly focused and has delivered positive results. The common thread is enhanced digitalization and utilizing of various AI-powered Martech tools.

P5 | People

Although the comparison does not measure the knowledge and skills of employees in the destinations studied, these are undoubtedly correlated with the success of the destinations.

Vienna's convention bureau employs 17 staff members, while Copenhagen's employs 22. Investment in employees and their continuous training is undoubtedly a factor in competitiveness. On a broader scale, lifelong learning and certification programs for the entire Slovenian meetings industry are recommended.

P6 | Process (execution)

The research clearly highlighted Slovenia's poor air connectivity compared to Austria, Denmark, and Croatia. This limits accessibility for international participants. Addressing this issue requires innovative approaches to improve multimodal accessibility, which could be supported by artificial intelligence.

P7 | Physical evidence

In the meetings industry, physical evidence is often understood as convention centers and hotel capacities.

Most Slovenian destinations have limited capacities, with banquet capacities being particularly problematic. Significant investments (like the Sava Centre) will be necessary in this area.

Slovenian convention centers and 4-5-star hotels lag behind those in Austria, Denmark, and Estonia. Without comprehensive investments, progress cannot be made, especially in the luxury segment and creating facilities for more demanding business guests.

P8 | Productivity and quality

The research revealed Slovenia's significant potential in the incentive sector. This market can only be fully exploited through product innovation and the creation of experiences with high-added value.

However, Slovenia trails significantly in digitalization and technological advancements in such products. Slovenia can take notes from Denmark and Estonia.

P9 | Partnerships

Most compared destinations are involved in various partnerships, with some acting as leaders. For example, the Chinavia project connects Scandinavian destinations with China. Many projects are co-financed by European funds, presenting a significant opportunity for Slovenia.

P10 | Performance (adaptability)

Performance today is primarily associated with environmental risks. The research identifies sustainability and social responsibility as strategic advantages. Slovenia's strong natural and cultural heritage appeals to boutique events and incentive groups. Slovenia could become a global center for regenerative events.

Additional ideas from best practices in comparable destinations

- ✓ Regenerating abandoned venues into pop-up locations (such as the Stožice shopping center).
- ✓ Subsidizing/support major events that generate higher added value (e.g., Vienna's model).
- ✓ Developing an international ambassador/influencer program with prominent individuals to promote Slovenia.
- ✓ Creating an overview of Slovenia's unique venues.
- ✓ Increasing the number of cultural events tailored to event participants (events-on-demand).
- ✓ Establishing strategic partnerships with Slovenian Railways.
- ✓ Securing European projects inspired by BEFuture.
- ✓ Developing new certified incentive ideas and programmes, following Estonia's example (see the Estonian Convention Bureau).

Possible differentiators in a global business events market

✓ Possible differentiation of Slovenia in natural and cultural factors

Slovenia should focus on its unique experiential diversity, architectural heritage, and sustainable tourism while fostering a strong cultural identity that distinguishes it from competitors.

✓ Possible differentiation of Slovenia in general and transport infrastructure

Slovenia should strengthen its multimodal accessibility, improve air connections, implement digital solutions, and refine sustainable public services.

✓ Possible differentiation of Slovenia in tourism infrastructure

Slovenia must invest in hotel infrastructure, enhance its culinary and cultural offerings, and creatively highlight its natural and sustainable advantages. Expanding entertainment and shopping options is crucial, as these areas are underdeveloped compared to competitors.

✓ Possible differentiation of Slovenia in congress infrastructure

Slovenia must upgrade infrastructure and the organization of convention bureaus outside Ljubljana, develop incentive products, and increase the visibility of smaller destinations. Systematic measurement of effects and the integration of the meetings industry into national strategies will boost international competitiveness.

✓ Possible differentiation of Slovenia in subjective destination evaluation

Slovenia must invest in digitalization and better destination organization, increase the visibility of smaller destinations, and introduce congress incentives. Hospitality, safety, and value for money should be the central themes in promotional efforts targeting regional and European event organizers.

✓ **Possible differentiation of Slovenia in destination marketing**

Slovenia must evolve its digital presence and marketing using modern technologies while significantly improving content marketing. Increasing visibility among B2B organizers and collaborating with local bureaus will strengthen recognition and competitiveness. Greater government support and innovative marketing strategies will help achieve a better destination image.

Five key strategies to differentiate Slovenia from comparable competitive countries by 2030.

Safety | Slovenia is one of the safest destinations in the world, ensuring trust among participants and event organizers.

Congress infrastructure | A comprehensive network of top-quality convention centers and hotels, ideal for medium-sized events.

Regenerative events | A pioneering approach to the regenerative transformation of events, with a global hub based in Ljubljana.

Creative marketing | Innovative campaigns enhance visibility and create unforgettable experiences.

Boutique events | The "less is more" strategy, with a personalized approach, authenticity, and sustainability, stands out on the global market.

The overall strategic goal is to transform Slovenia from the runner-up into a market leader that will once again become a trend-setting destination.

Unfortunately, enthusiasm alone will no longer suffice. The strategy must address the challenge of creating a supportive environment.

1.3. Analysis of the demand for the Slovenian meetings industry for the period from 2018 to 2023

First Analysis & Recommendations | “Collecting valuable data & insights”

For the first time in the history of Slovenia's meetings industry, we have conducted a comprehensive analysis of companies' business performance.

This research is based on balance sheet and income statement data published by AJPES, derived from the annual financial reports of business entities.

One of the key challenges of such a study lies in the fact that companies are registered under different industry classifications, making direct comparisons difficult.

To address this, in collaboration with the Slovenian Convention Bureau, we identified all active companies within the key membership categories of KUS.

- Category A: Local and Regional Convention Bureau
- Category B: Professional Congress Organiser
- Category C: DMC Agency
- Category D: Event Management Agency
- Category E: Congress and Exhibition Centre
- Category F: Congress Hotel
- Category G: Hotels with Conference Facilities
- Category H: Providers of Other Congress Services
- Category I: Special Event Venues

A total of 176 companies were analysed, providing the first real data on the industry's business volume in the pre-pandemic period (2018 and 2019) and the post-pandemic period (2022 and 2023).

This business analysis has given us valuable insights into the sector, which can be understood as a group of companies producing and selling similar or identical products and services. If we wish to strategically position the meetings industry within the broader economic environment, this segment of research is of paramount importance.

A major added value of this analysis lies in the calculation of EBIT, EBITDA, and value added per employee, along with other business performance indicators. These data will prove invaluable in the second phase of the project, where they will serve as a concrete foundation for the development of an action and communication plan.

The cumulative data are particularly revealing, as for the first time, we now have a truly clear picture of the state of our industry.

For instance, the study found that in 2023, the total revenue of the analysed companies amounted to €1,012,615,555.76, of which direct revenue from the meetings industry accounted for €412,512,11.

Never before have we had such precisely calculated figures. The combination of these data will offer a deeper insight into the industry's competitiveness.

One particularly interesting figure is the value added per employee. In 2023, the average value added per employee was €51,276.94, which indicates significant potential for further development.

From a strategic perspective, we should aim to double this figure.

This could be achieved through

- ✓ Investing in innovation capabilities, the digital economy, and human capital
- ✓ Ensuring a conducive business environment for the growth and development of companies in the meetings industry

This is just one example of how the collected data will be applied in the second, strategic phase of the project.

✓ **Methodology**

For the calculations, we applied the following formulas.

- **Formula for EBIT calculation:**

Net revenue from sales (1) + change in inventory value (2) + other operating income (4) - costs of goods, materials, and services (5) - labour costs (6) - depreciation and amortisation (7) - other operating expenses (8)

- **Formula for EBITDA calculation:**

EBIT + depreciation + write-offs / net revenue from sales (1) + change in inventory value (2) + other operating income (4) - costs of goods, materials, and services (5) - labour costs (6) - depreciation and amortisation (7) - other operating expenses (8)

- **Formula for value added per employee:**

EBIT + depreciation + labour costs (2)

For further detailed information on PHASE 1.3., please refer to the enclosed document “Analysis of the demand for the Slovenian meetings industry for the period from 2018 to 2023 (SI | Slovenian language)”.

1.4. Analysis of the direct tourism impact of the meeting industry among KUS members for the period of 2018 to 2023

First Analysis & Recommendations | “Missing data report system”

The analysis aimed to provide an overview, as comprehensive as possible, of the contribution of the meeting industry to the wider tourism sector.

✓ Methodology

Tourism in connection with the meetings industry, hereinafter referred to as MICE tourism.

First, we identified key indicators of MICE tourism in Slovenia and developed a standardized form for data collection.

In the second step, the form was sent by e-mail to representatives of KUS member hotel companies. The strong non-responsiveness of the hotel company representatives was a negative surprise, and we decided to adopt our approach.

We contacted the hotel company representatives again by e-mail and also called them personally. All with a view to improving our performance and, consequently, gathering more data for the analysis. Unfortunately, the changed approach to data collection has not resulted in any significant improvement in the data collection efforts.

It should also be noted that the business policies of certain hotel companies do not allow them to share what they consider to be commercially sensitive information.

As mentioned above, the data collection was clearly unsuccessful. The exact reasons for this can only be speculated, but it can be assumed that the hotel companies do not collect the data in a way that would allow it to be analyzed, or that they are unwilling to share it for the purpose of this analysis because of their internal business policy, despite the fact that this is the only way in which the Slovenia Convention Bureau, of which they are members has requested them to do so.

In our opinion, the type and amount of data collected, unfortunately, reflects the current realistic readiness of Slovenian hotel companies to participate in this survey.

The data also showed large variations, which we attribute to non-uniform collection methods.

The data such as average length of stay, demographic profile of guests and seasonality specific to MICE tourism are not collected by many hotels or are collected in a way that is not useful for this analysis. As a result, we were not able to obtain these data.

In conclusion, this part of the requested survey & analysis can be considered unsatisfactory, from the data collection, value & analysis.

However, it does document very clearly the current lack of a unified data report system (data collection, sharing mechanism & reporting)

This data report system is urgently needed, as this would facilitate analysis and insights into the state of meeting industry in Slovenia. The data collected in this way would enable the formulation of appropriate business policies aimed at the growth of the Slovenian meeting industry.

For further detailed information on PHASE 1.4., please refer to the enclosed document “Analysis of the direct tourism impact of the meeting industry among KUS members for the period of 2018 to 2023 (SI | Slovenian language)”.

2. Analysis of the market potential of the meetings industry in Slovenia compared to the international market.

We analyzed the international market, identified general main trends and defined general key market potentials for the Slovenian meeting industry for 2025 to 2030.

2.1. Analysis of market potential by MICE segments in at least three selected international target markets and client behavior in these markets, based on the results of a separate survey among KUS members, which was conducted by the contractor.

✓ Survey results | KUS members

We received a total of 24 completed survey answers, from a current total of 53 KUS members.

Although we have extended the survey deadline several times and the Slovenian Convention Bureau (SB) has sent a few friendly reminders, the participation in the survey remained rather low.

Here are their TOP target markets.

• GEOGRAPHICAL markets

TOP 10 2023/24 (Results)	TOP 10 2025 (Forecast)	TOP 10 Until 2030 (Future)
GERMANY	GERMANY	GERMANY
SLOVENIA	SLOVENIA	USA
CROATIA	CROATIA	HUNGARY
ITALY	ITALY	AUSTRIA
AUSTRIA	AUSTRIA	CROATIA
USA	USA	UK
HUNGARY	HUNGARY	ASIA
UK	FRANCE	ITALY
BELGIUM	BELGIUM	SLOVENIA
FRANCE	UK	POLAND

• CLIENT markets

TOP 3 2023/24 (Results)	TOP 3 2025 (Forecast)
COMPANIES/CORPORATIONS	COMPANIES/CORPORATIONS
GOVERNMENT/PUBLIC INSTITUTIONS	GOVERNMENT/PUBLIC INSTITUTIONS
ASSOCIATIONS	ASSOCIATIONS

- **EVENT Purpose/Format**

TOP 5 2023/24 (Results)	TOP 5 2025 (Forecast)
SCIENTIFIC CONFERENCES	BUSINESS CONFERENCES
BUSINESS CONFERENCES	SCIENTIFIC CONFERENCES
BUSINESS TRADE FAIRS	BUSINES WORKHOPS
BUSINESS WORKSHOPS	INCENTIVES
INCENTIVES	BUSINESS TRADE FAIRS

These survey results are in line and confirm the research findings of point 1 (Analysis and review of the current state of the meetings industry in Slovenia) in this PHASE one.

It is known and proven that **the meeting industry (business events sector) and its purpose** are much closer connected to the general economic and scientific developments, international connections and relationships of a city and/or country than to their tourism development & goals.

The historic & still strong “bond” with the tourism industry in general is based on its need for the hospitality, infrastructure and logistics elements to fulfill its very own purpose in **creating live and in-person communication platforms, through unique channels, engagements and experiences.**

The meeting industry serves both as a mirror and driver for the future development in those related sectors of business/industry and of knowledge in a destination.

First Analysis & Recommendations | “Focusing on the doable.”

During the already mentioned period of dynamic marketing (2010-2020), the meeting destination Slovenia has gained visibility & recognition on the international market, building a strong brand for the emerging sustainability topic and became a trend-setting destination.

Nowadays, Slovenia is considered an established and to a certain extent mature destination, with room for improvement in quality and variety of their product & services.

Hence, there is no need to “re-invent the wheel”, but to build on that recent success story, starting and adding a new chapter over the next 5 years.

It’s time to continue with a more focused and sharpened market approach & message by taking into consideration the real purpose of the meeting industry and what’s doable in the end.

That means the future definition of potential markets is not done anymore by the approach to fill the current tourism infrastructure by extending the tourism/hospitality offering to another potential “tourism” market segment.

Instead, it should be defined by matching future business events’ purpose & content with the city or/and country development (e.g., leading sectors of business/industry and of knowledge) and the meeting destination brand.

The “matchmaking” should be based, in principle, on

- ✓ **the understanding & definition of the two essential markets**
 - Business/Industry market = Leading business/industry sectors in and established international economic trade relations with Slovenia
 - Knowledge market = Leading sectors of science/knowledge and established international relationships through local associations and educational institutions in Slovenia
- ✓ **the definition of the essential “players” (clients) in those two markets**
 - Business/Industry market = Corporation, Public/Government, Trade association, Multiplier/Event agencies
 - Knowledge market = Science/Medical association, Educational institutions, Multiplier/POC agencies
- ✓ **the selection of the most potential markets & clients**
 - Business/Industry market = International business/industry rankings, economic statistics (e.g., international trade balances, Import & Export statistics)
 - Knowledge market = Headquarters of international associations, local associations (with international connections) in Slovenia, international association networks (ICCA, UIA, etc.)
- ✓ **the focus on the most potential business events formats based on the destinations’ unique experiences and realistic capabilities**
 - Business/Industry market = Business events (conferences, meetings, workshops, trade fairs, incentives, etc.) up to a certain scale & scope
 - Knowledge market = Association meetings/conferences up to a certain scale & scope

Analyzing the above-mentioned results of the KSU member survey, there are already elements of this “matchmaking” approach visible (e.g., the correlation between geographical markets and the latest import & export statistics of Slovenia or the current focus on event formats).

Furthermore, the meeting destination Slovenia has already successfully applied some of those principles of destination branding & marketing, in the past, with their “Green/Sustainability” and “sLOVEria” campaigns.

To create and develop the new destination brand and to (re)define the matching future markets is part of the purpose & tasks of this Strategy 2030 project, in the following steps.

3. Analysis of the perception of Slovenia as a destination suitable for MICE from the point of view of foreign event organizers.

We conducted an online survey reaching out to the international business events client's market. A total of 342 surveys have completed with a representative international sample of event organizers.

3.1. Implementation of an online survey on the perception of Slovenia among foreign event organizers.

✓ Key statements

Following some key statements from the survey participants.

"Maintain a strong presence across diverse platforms and events. Develop creative, out-of-the-box ideas for unique promotional events that capture attention and showcase the rich complexity and stunning beauty of sLOVEnia."

"Here are a few recommendations for the Slovenian Convention Bureau to enhance its offerings and attract more international MICE visitors

- Boost visibility through targeted digital marketing
- Develop customized incentive programs
- Prioritize improvements in accessibility and infrastructure
- Highlight Slovenia's green credentials and commitment to sustainable events."

"The best way to promote an event destination is by thoroughly understanding it. FAM trips are essential as they enable agencies to gain firsthand knowledge and recommend destinations that best meet their clients' needs."

"In today's highly competitive environment, providing effective advice is a challenge. However, the key lies in developing an idea that is both attractive and unique standing out from other destinations without going overboard, while acknowledging the need for significant investment. This idea should prioritize human values, reconnecting with timeless qualities and the surrounding context. It should be a concept that positions the entire country as an unmissable, one-of-a-kind destination."

"To ensure a consistently high-quality experience, the Slovenian Convention Bureau could offer training programs for local event suppliers (hotels, caterers, transportation companies) on best practices, trends in the MICE industry, and customer service excellence."

"The Slovenian Convention Bureau could enhance its offerings by developing a user-friendly online platform to effectively showcase venues and services."

"Promote Unique Selling Points: Natural Beauty and Sustainability. Emphasize Slovenia's commitment to sustainability and its breathtaking natural landscapes. Highlight green event venues, eco-friendly practices, and iconic locations like Lake Bled or Triglav National Park for meetings and incentives.

Cultural Heritage: Showcase Slovenia's rich traditions, gastronomy, and history by integrating them into events, offering attendees authentic and unforgettable experiences."

"Leverage testimonials and case studies from past events to inspire confidence and demonstrate success."

"You are doing a great job! I have attended Conventa once and I have recommended colleagues who attended. I hope to attend again."

“See things differently (what is the real USP of Slovenia I don’t know, and that’s something you should work on).”

“Work on Slovenia’s visibility, in the recent years the competition was louder. And if you can improve accessibility it wouldn’t harm!”

✓ **Key insights**

Following some key insights from the survey participants.

- Slovenia is praised for its natural diversity, commitment to sustainability, and unique cultural experiences.
- The destination’s compact size and central European location make it highly accessible and efficient to explore.
- Respondents appreciate Slovenia as an undiscovered gem with strong value for money, ideal for both tourism and business events.
- Slovenia’s friendly hospitality and reputation for safety further enhance its appeal.

First Analysis & Recommendations | “Listening to the market.”

Slovenia is distinguished by its natural beauty, sustainability leadership, and authentic cultural experiences, offering a boutique, accessible, and eco-friendly alternative to more mainstream European destinations.

The Slovenian Convention Bureau has made strong strides, but continued efforts in familiarization trips, improved accessibility, and global marketing are essential. By promoting Slovenia’s regional diversity, sustainability, and unique experiences, the bureau can position Slovenia as a competitive and desirable destination for business events.

Some concrete Ideas & recommendations from the survey participants

- ✓ **FAM Trips** | Organize more familiarization tours to help planners experience Slovenia firsthand.
- ✓ **Accessibility** | Improve flight connections and address travel challenges.
- ✓ **Visibility** | Increase global marketing, especially in emerging markets, and promote Slovenia’s USPs.
- ✓ **Sustainability** | Emphasize Slovenia’s leadership in sustainability and eco-tourism.
- ✓ **Communication** | Strengthen communication through digital tools, product updates, and collaboration.
- ✓ **Incentives and Support** | Develop tailored programs and financial support for event organizers.
- ✓ **Regional Diversity** | Highlight Slovenia’s attractions beyond Ljubljana.
- ✓ **Focus Markets** | Target India, North America, LATAM, and other key regions for growth.

For further detailed information on PHASE 3.1., please refer to the enclosed document “Detailed report | Analysis of the perception of Slovenia as a MICE destination (EN | English language)”.

4. Analysis of the expectations of stakeholders in the Slovenian meetings industry.

We conducted a total of 24 personal interviews with key stakeholders from 6 Slovenian key regions. The interviews, moderated by Gorazd Čad and Ivo J. Franschitz explored the current state and future vision of the Slovenian meetings industry.

4.1. Personal interviews with local/regional/national key stakeholders.

✓ Interview summary

Following the key highlights of those 24 online interviews.

- The conversation focused on the current state and future of the meeting industry in Slovenia, discussing strategic development, stakeholder relationships, and the importance of digitalization.
- The stakeholders emphasized the need for honest feedback, the significance of flagship events, and the potential for growth in international markets. They also highlighted the necessity of better marketing strategies and the importance of collaboration among stakeholders to enhance Slovenia's presence in the MICE sector.
- The interviews delved into the intricacies of the meeting industry in Slovenia, focusing on language barriers, stakeholder relationships, marketing strategies, and future growth opportunities. The stakeholders discussed the importance of effective communication, the need for better marketing to attract international events, and the significance of understanding the current landscape of the meeting industry.
- Various stakeholders also highlighted the key markets for future growth and expressed wishes for improvements in the industry, particularly regarding flight access. The conversation explored the evolving landscape of the MICE industry in Slovenia, with a particular focus on the growing importance of the Asian market, the evaluation of Slovenia's hotel industry, the impact of MICE on seasonal business, key events shaping the industry, infrastructure challenges, and a vision for the future of the meeting industry.
- The interlocutors discussed the importance of collaboration among stakeholders, the need for improved accessibility and marketing strategies, and the significance of national markets.
- The stakeholder emphasized the potential for growth in medical events and the quality of hotels, while also addressing investment and promotional strategies to enhance Slovenia's reputation as a business event destination.
- Key themes include the importance of infrastructure investments, the role of incentive events, strategic marketing practices, and the need for improved relationships among stakeholders.
- The stakeholders expressed their wishes for improvements, including a modern convention center and better weekend offerings in Ljubljana. Some also mentioned the significance of understanding the market and the need for targeted marketing strategies to attract international business events.

- The discussion also highlighted the significance of MICE in economic development and the potential for collaboration among venues to enhance overall experience for clients. The conversation delved into Slovenia's potential as a MICE destination. Key themes included the importance of guiding clients through the event planning process, identifying target markets, addressing infrastructure challenges, leveraging flagship events, and the need for investment in local facilities. The discussion also highlighted the role of Destination Management Companies (DMCs) and the necessity for collaboration to enhance Slovenia's appeal in the MICE sector.
- Stakeholders expressed the importance of aligning expectations and developing a cohesive strategy for the future. The discussion also covered destination marketing, the significance of brand development, and the potential of various target markets. Leadership and stakeholder engagement were outlined as crucial elements for progress in the industry.

First Analysis & Recommendations | “Working together.”

While the known & obvious topics (e.g., lack of general accessibility, the need for improved & new infrastructure, the desire for increased capacities) have been mentioned by some of the stakeholders, most of the interviewees expressed a positive and very realistic analysis of the current state of the meeting industry in Slovenia.

The stakeholders understand the potential of the meeting industry (business events sector) and their approach towards further development & growth is based on a proactive attitude.

The defined future key success factors are a more inclusive collaboration between all Slovenian regions, a need for a better understanding for the meeting industry's potential beyond the core stakeholder circle, and a change of mindset and more focus on the “doable” rather than on the “wishful”.

Some key takeaways from the interviews

- ✓ The current state of the meeting industry in Slovenia is satisfactory but has room for improvement.
- ✓ The Slovenian MICE industry is gaining recognition in Europe.
- ✓ The meeting industry in Slovenia shows growth and potential.
- ✓ Collaboration among stakeholders can enhance Slovenia's MICE offerings.
- ✓ Collaboration with the Slovenian Convention Bureau is crucial for success.
- ✓ Connectivity among stakeholders is crucial for the success of the meeting industry.
- ✓ Collaboration among venues can enhance the overall experience for clients.
- ✓ Honest feedback is crucial for strategic development.
- ✓ Understanding market dynamics is key for future strategies.
- ✓ Destination marketing should highlight unique experiences in Slovenia.
- ✓ Marketing strategies should differentiate between various destinations in Slovenia.
- ✓ Flagship events play a significant role in promoting destinations.
- ✓ Events like Conventa play a vital role in building networks among stakeholders.
- ✓ Digital marketing and storytelling are essential for attracting events.
- ✓ Digitalization is lacking in Slovenia's event marketing.

- ✓ There is a need for better infrastructure and investment in MICE.
- ✓ Investment in infrastructure is necessary to support the future growth of the MICE sector.
- ✓ Improving flight connections is essential for attracting international clients.
- ✓ Eastern European markets show potential for growth in MICE.
- ✓ The national market plays a significant role in the MICE sector.
- ✓ Emerging markets, such as South America and Asia, present new opportunities for Slovenia.
- ✓ Medical events present a growth opportunity for the meeting industry.
- ✓ Quality of service in Slovenian hotels needs improvement.
- ✓ Sustainability is a key focus for the future of the meeting industry.
- ✓ The importance of human touch in the meetings industry cannot be overlooked.