

# Slovenia

## Tourism in the economy

In 2017, the GDP related to tourism amounted to EUR 2.3 billion, or 5.3% of total GDP. Considering the direct and indirect impacts, tourism contribution to the GDP is estimated to be EUR 3.6 billion, that is approximately 8.4% of total GDP. In 2018, tourism exports amounted to EUR 2.7 billion, creating a tourism balance of payments surplus of EUR 1.7 billion. In 2018, tourism industries employed 68 150 people and directly accounted for 7.7% of total employment in the country. Travel exports accounted for 34.0% of total service exports in 2018.

Inbound tourists amounted to 4.4 million in 2018, up 10.9% from the previous year. Overnight stays for international tourists in all accommodation categories totalled 11.2 million in 2018, an increase of 15.4% over 2017. Core markets included Italy (13.5% of all inbound overnight visitors), Germany (11.4%), Austria (8.6%), Croatia (4.9%), the Netherlands (4.2%), the United Kingdom (3.7%), and Serbia (3.1%). The Netherlands and Germany, experienced year on year growth of 22.7% and 15.9% respectively. In 2018, domestic trips totalled 10.9 million, of which 2 million (18.3%) were overnight stays, and 8.9 million (81.7%) same-day visits. The total number of overnights in all accommodation was 5.4 million, an increase of 11.1% from 2017.

## Tourism governance and funding

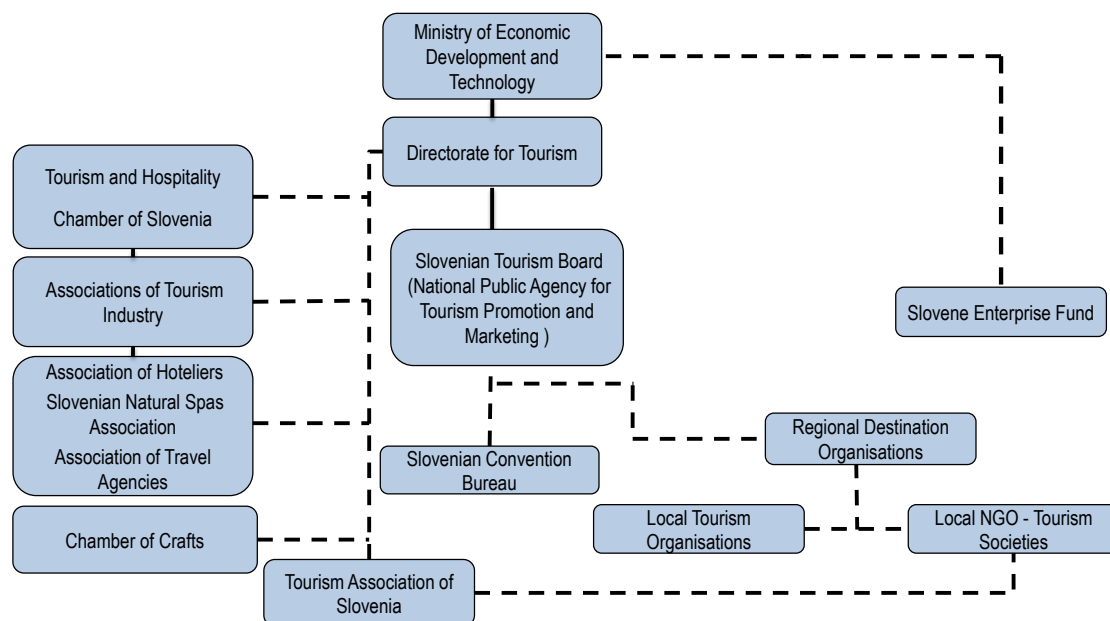
The Ministry of Economic Development and Technology is responsible for implementing national tourism policy. Marketing is the responsibility of the Slovenian Tourism Board, a public agency that is also responsible for tourism information, market data, coordinating product development, engaging stakeholders and undertaking market research. At the national level, the Statistical Office of the Republic of Slovenia is charged with collecting, analysing and disseminating tourism data while the Slovene Enterprise Fund encourages tourism SMEs investment via soft loans and grants. Tourism industry organisations include: i) the Chamber of Commerce and Industry of Slovenia – with the related Chamber of Tourism and Hospitality representing the interests of tourism entrepreneurs via optional membership, ii) the Chamber of Crafts and Small Business of Slovenia – representing the interests of tourism and catering entrepreneurs and craftsmen, iii) the Trade Union of Tourism and Catering workers, and iv) the Tourism Association of Slovenia – incorporating 655 local association members.

The strategic planning of tourism reflects a close partnership between the public and private sectors, as well as tourism NGOs. The Ministry co-operates and regularly consults with the industry organisations representing the accommodation and hospitality industry, travel trade, wellness tourism, MICE, etc. In terms of different sectoral policies and legislation co-ordination with an impact on tourism, a wide cross-governmental co-operation exists. Particular emphasis is currently placed on working with four ministries: Culture; Agriculture, Forestry and Food; Infrastructure; Spatial planning and Environment, Education and Sport.

The twelve Regional Development Organisations accountable to the Regional Councils undertake overall development at regional level including the tourism development programmes. The Government has

additionally established and funded twelve Regional Destination Organisations to support tourism development, promotion and marketing at the regional level. Regional tourism development priorities are governed by national legislation and reflect basic goals of the National Tourism Strategy but with specific regional development goals. At local level, each mayor and Community Council is responsible for tourism development. A locally collected accommodation tax provides EUR 17.5 million per year, and it is dedicated to local tourism development and marketing. This is the principal source of funding for local tourism development typically providing investment for information centres, walking and cycling trails and local marketing activities.

### Slovenia: Organisational chart of tourism bodies



Source: OECD, adapted by the Ministry of Economic Development and Technology, 2020.

In 2018, the central tourism budget was EUR 13.5 million, with EUR 12.9 million of this being allocated to the Slovenian Tourism Board. The Promotion of Tourism Development law provides a further source of funding consisting of both the tourist tax and an additional promotional tax providing some EUR 4.5 million annually. Another source of revenue for tourism development budget comes from the State's gambling concessions, which is allocated to pre-defined areas of Slovenia and amounts to approximately EUR 18 million per year.

### Tourism policies and programmes

In 2017, the Government of the Republic of Slovenia adopted a new Strategy for the sustainable growth of Slovene tourism 2017-21, with the strategic vision for Slovenia to be recognised as a global, green, boutique, five stars destination for demanding visitors. The strategic goal of Slovene tourism is to increase revenues from international visitors to EUR 3.7 billion by 2021 from the current EUR 2.7 billion. Supplementary targets include an additional 5- 5.5 million visits, 16-18 million overnight stays, and 18 000 to 22 000 new rooms. Six key policies are identified:

- Developing a new organisational structure for Slovene tourism - which has divided the country into four macro-destinations (Mediterranean Slovenia, Alpine Slovenia, Thermal Pannonian Slovenia

and Central Slovenia with Ljubljana) and 35 lead destinations. To support sustainable tourism development and management of destinations, the Master Plans for the four main destinations are in development. Master Plans will focus on tourism education and training, stimulating green and innovative tourism products of SMEs and high quality services development, enhancing digital promotion of the 35 lead destinations, and marketing clusters of similar destinations and geographically linked exceptional tourist experiences. The objective of the clusters is to strengthen the identity of particular destination and to achieve synergies both in development of the most representative destination products and services along with the more focused marketing communications and destination promotion.

- Streamlining institutional and legal frameworks to create a better environment for business to flourish. This will include a more effective distribution of the tourist tax at local level; expanding the definition of accommodation to include new forms and accommodation quality standards, such as glamping facilities; new regulations for mountain biking and hiking trails; training for outdoor sports; and improvements to safety and security legislation.
- Investing in new and existing accommodation and related tourism infrastructure to increase competitiveness and raise quality.
- Investing in training and education, including updating vocational education standards; developing upper-level courses; promoting tourism as a business and entrepreneurial potential for changing the image of employment opportunities in the sector; establishing a national centre for on-the-job education and training; assisting small and specialised hotels for improving their employees skills and trainings.
- Strengthening land use planning to enable better inclusion of cultural and natural resources and appropriate tourism infrastructure construction planning.
- Supporting small tourism businesses to encourage entrepreneurship and enhance the quality of the tourism offer. Support to small businesses is focused on digital transformation; transition to a low carbon economy; and assistance with grant procurement to improve product quality and services. Some EUR 13.4 million of small grants has been allocated to SMEs over the last two years. To support investment in sustainable tourism and increase the competitiveness of tourism SMEs, a special Incentive credit scheme at the SID Bank of Slovenia, a public development and export Bank, amounting to EUR 160 million, has been established.

Slovenia has introduced a national Strategy for Smart Specialization, which is the base for the creation of Strategic Innovation Development Partnerships, including the one for tourism. The Strategic Partnership for Tourism allows for the wide participation of interested stakeholders from commerce, the research and development sector, civil society and the public sector to co-operate in providing smart and digital solutions for more accessible and competitive Slovene tourism. Key areas of project co-operation include development of new digital channels to attract consumers, digitalising a wide range of tourism products and new ICT solutions to maximise the efficiencies of tourism businesses on the market. Aligned to the Digital Slovenia 2020 Strategy, the new digital solutions are envisaged to support the sustainable use of natural and cultural resources for tourism and to upgrade the Green Scheme of Slovene tourism.

## Statistical Profile

### Slovenia: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	10 016	..	..	10 917
Overnight visitors (tourists)	1 888	1 535	1 720	1 813	2 003
Same-day visitors (excursionists)	..	8 481	..	..	8 914
Nights in all types of accommodation	4 883	4 515	5 024	4 871	5 412
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	2 675	3 022	3 397	3 991	4 425
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Italy	480	527	573	608	599
Germany	277	314	342	437	506
Austria	285	304	336	373	382
Croatia	134	152	171	195	219
Netherlands	87	95	108	151	185
Nights in all types of accommodation	6 833	7 482	8 340	9 685	11 176
Hotels and similar establishments	6 041	6 610	7 410	8 452	9 826
Other collective establishments	792	871	930	1 233	1 350
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	4 672	4 909	5 408	5 410	5 409
Overnight visitors (tourists)	2 642	2 867	2 853	3 013	3 188
Same-day visitors (excursionists)	2 030	2 042	2 555	2 397	2 221
Top destinations					
Croatia	1 494	1 614	1 660	1 680	1 732
Italy	157	217	152	208	236
Austria	162	189	149	171	204
Germany	117	109	103	168	191
Bosnia and Herzegovina	129	132	117 e	142	142
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	2 298	2 338	2 451	2 688	2 870
International travel receipts	2 140	2 162	2 271	2 523	2 704
International passenger transport receipts	158	176	181	164	166
<b>Outbound tourism</b>					
Total international expenditure	1 238	1 235	1 337	1 443	1 492
International travel expenditure	1 119	1 109	1 176	1 322	1 390
International passenger transport expenditure	119	126	161	120	103

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077825>

## Slovenia: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>28 092</b>	<b>57 084</b>	<b>58 437</b>	<b>63 661</b>	<b>65 848</b>	<b>68 150</b>
Accommodation services for visitors	7 399	13 457	13 561	16 248	16 987	17 570
Hotels and similar establishments	3 740	8 775	8 956	9 212	9 818	10 235
Food and beverage serving industry	7 643	21 651	22 368	23 995	24 495	25 322
Passenger transport	1 214	5 025	5 056	5 222	5 438	5 826
Air passenger transport	110	539	561	547	610	736
Railways passenger transport	1	.. c	.. c	.. c	.. c	.. c
Road passenger transport	1 028	3 798	3 849	4 003	4 133	4 430
Water passenger transport	75	.. c	.. c	.. c	.. c	.. c
Passenger transport supporting services	427	2 889	2 895	2 959	3 097	3 126
Transport equipment rental	269	303	332	322	435	469
Travel agencies and other reservation services industry	1 035	1 809	1 858	1 944	2 060	2 257
Cultural industry	6 128	7 307	7 526	7 803	8 073	8 197
Sports and recreation industry	3 977	4 643	4 841	5 168	5 263	5 383
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available; c Confidential data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077844>

## Slovenia: Internal tourism consumption

Million EUR

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>1 241</b>	<b>2 947</b>	<b>4 269</b>
Tourism characteristic products	869	1 444	2 394
Accommodation services for visitors	151	548	746
Food and beverage serving services	214	394	608
Passenger transport services	284	191	474
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	60	46	106
Cultural services	63	22	118
Sports and recreation services	98	244	342
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	372	1 502	1 875
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	<b>..</b>	<b>..</b>	<b>..</b>

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077863>



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