

Slovenia

Tourism in the economy and outlook for recovery

Tourism has grown steadily in the last decade in Slovenia, with international arrivals more than doubling from 2010 to 2019. Tourism directly contributed 5.4% of total GDP in 2019, which increases to 8.5% with indirect effects included. Tourism-related sectors employed 7.7% of total workforce in 2019. As a result of COVID-19, tourism's direct contribution fell to 3.3% of GDP in 2020, or EUR 1.5 billion, and tourism employment fell to 7.0% of the national workforce. Tourism exports decreased by almost 60% to EUR 1.2 billion.

In 2019, Slovenia recorded 4.7 million international tourists in accommodation establishments. The impacts of COVID-19 saw this fall 74.1% to 1.2 million in 2020. This increased to 1.8 million in 2021, but still remained 61.0% below 2019 levels. There was a decrease of 51% in total arrivals and a 42% decrease in nights in 2020. The number of international arrivals in 2020 decreased by 74.1%.

The large decline in international tourists was partially compensated by domestic tourists, which increased by 21% in 2020 and a further 17.4% to 3.2 million tourists in 2021. This increase in domestic tourists saw the domestic share of tourism expenditure in Slovenia increase to 47% in 2020, up from 28% in 2019. Slovenia expects tourism to return to pre-pandemic levels in 2024.

Tourism governance and funding

At the parliamentary level, the Committee for the Economy is responsible for tourism-related legislation. The Ministry of Economic Development and Technology (MEDT) is the main government department responsible for providing and implementing national tourism policy. MEDT co-operates and consults with the tourism sector and social partners to reflect the close partnership between the public and private sectors and non-governmental organisations (NGOs) dealing with tourism issues.

The Slovenian Tourist Board (STB) oversees the promotion of Slovenia as a tourism destination and related marketing activities. The STB is also responsible for tourist information and data, product development, stakeholder networking, and market research and development. The STB programme of work is adopted on an annual basis and is financed by the national budget.

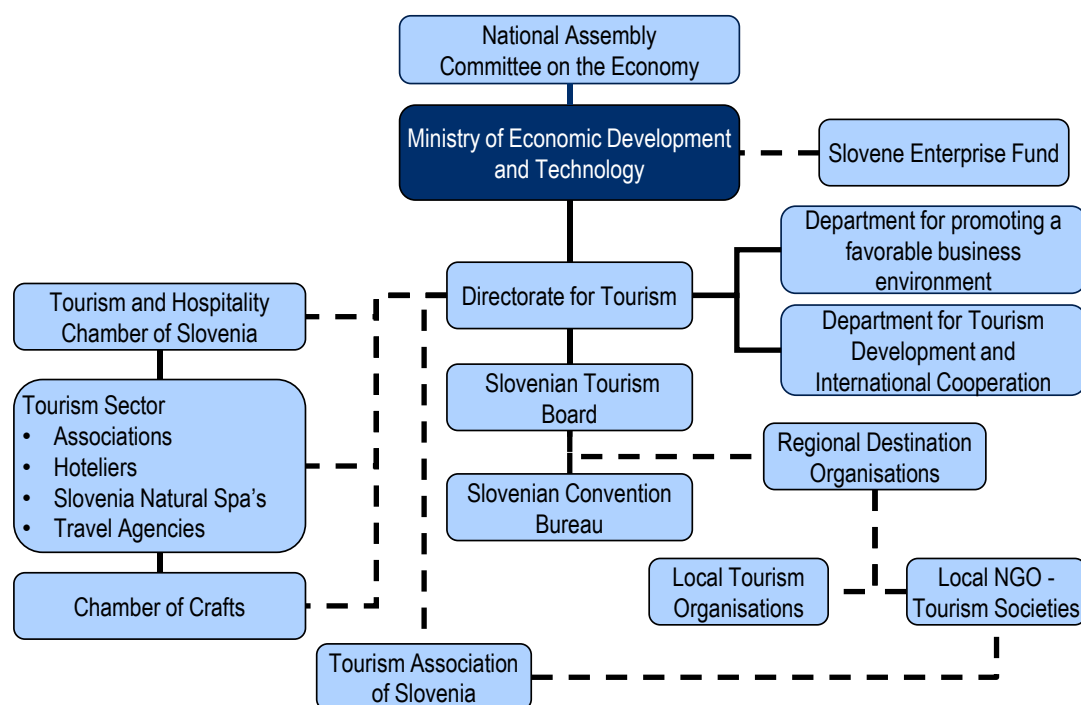
Twelve Regional Development Agencies (RDAs) undertake tourism development at the regional level. RDAs report to the Regional Councils comprised of the mayors of the local communities in each region. Regional tourism development is governed according to national legislation and strategic development objectives, but specific regional development objectives are included in the overall regional plans. At the local level, each mayor and Community Council is responsible for tourism development according to national legislation and strategic objectives, but with specific local tourism development goals.

In 2020, Slovenia established a Tourism Advisory Council as a special working group comprised of industry representatives, tourism policymakers, the STB and NGOs related to tourism. The Council monitors the current situation in tourism and the impact of the pandemic and the war in Ukraine on the Slovenian tourism sector.

The overall national budget for tourism in 2022 is EUR 63.3 million (EUR 25 million in national funds and EUR 38 million in EU funds). The national budget allocated for tourism development at the local and municipal level and for the operating programme of the Slovene Tourism Board (STB) comes primarily from tourist taxes for overnight stays and concession fees for gambling. The budget has been significantly reduced due to the decrease in the number of visitors due to travel restrictions in 2020-21. The 2021 budget was EUR 14.4 million, up from EUR 12.3 million in 2020 but still below the 2019 budget of EUR 17.4 million. For 2022, the budget allocation for the STB programme was EUR 16 million.

EU Funds, including NextGenEU and React EU, provide investments of EUR 80 million in green, digital and sustainable infrastructure for industry and destinations, for example, investing EUR 50 million in the transformation of mountain destinations.

Slovenia: Organisational chart of tourism bodies



Source: OECD, adapted by the Ministry of Economic Development and Technology, 2022.

Tourism policies and programmes

The Recovery and Resilience Plan of Slovenian Tourism 2020-23, the new Strategy for Slovene Tourism 2022-28, and the recently adopted Strategy for Digital Transformation of Slovenian Tourism 2022-26 define the tourism policy and programmes for Slovenian tourism until 2028. Tourism also features in the Slovenian Industrial Strategy 2030.

The Slovenian Tourism Strategy 2022-28 represents the basic framework for developing Slovenian tourism. The Strategy responds to the new circumstances and challenges and develops and promotes the key advantages of Slovenian tourism (see box below).

The green transition remains the priority in all plans for the recovery and resilience of Slovenian tourism and is a basic principle for the strategic development of tourism in the future. The main tourism development objectives are the green and digital breakthrough of Slovenian tourism with a co-ordinated

strategic approach required by the changed consumer behaviour due to the COVID-19 crisis and Russia's the war in Ukraine. Slovenia committed itself to sustainable and green tourism long before the COVID-19 pandemic, aiming to balance the needs of tourists with those of the destination and local population. This remains the priority in all plans for recovery and resilience and will continue as a basic principle for the future strategic development of Slovenian tourism.

One of the main tools for promoting green and sustainable tourism is the Green Scheme of Slovenian Tourism (GSST), a certification programme and tool developed at the national level under the Slovenia Green brand. This programme requires strict national and international standards for responsible tourism to be followed. The growing number of members of the GSST further helps promote Slovenia as a destination committed to green and sustainable tourism.

Slovenia has taken numerous measures to enable the survival and active operation of the Slovenian tourism sector in light of the COVID-19 pandemic and war in Ukraine. Slovenia provided more than EUR 1 billion in aid to the tourism sector within the ten COVID-19 packages and a special intervention law that helped the hospitality and tourism sector mitigate the pandemic's effects, preserve jobs, and alleviate corporate liquidity problems. Among them is a special measure for a one-time supplement of EUR 10 million for the most affected segments of the tourism sector. It aims to help the most affected companies restart their activities after lifting the restrictions related to COVID-19. Companies will be able to obtain up to EUR 6 000 in aid per employee.

Slovenian Tourism Strategy 2022-28

The Tourism Strategy 2022-28 defines Slovenia as *“a role model for smart destinations that strengthens and encourages the development of sustainable, boutique, personalised and innovative experiences”*.

The Strategy is aimed at a balanced growth scenario, which envisages a moderate increase in capacity and quantitative indicators. The goal of Slovenia's smart destinations is to empower all stakeholders for data-supported decision-making, an increase in added value, competitiveness and resilience of tourism, promote a sustainable transformation of the whole ecosystem for a smaller footprint, personalise guest experiences (greater value for all), improve knowledge and digital competencies of employees and to ensure a higher quality of life for locals.

The Strategy sets five strategic goals:

- Increase the quality, value and all-year-round tourist offer.
- Increase the satisfaction of locals, employees and guests.
- Position tourism as a generator of value and sustainable development.
- Decarbonise and balance Slovenian tourism.
- Ensure a competent and efficient management structure.

It is expected that the implementation of the Strategy will result in an increase in added value generated in basic tourism activities of 43%, from EUR 0.9 billion in 2019 to EUR 1.3 billion per year until 2028. It is estimated that together with other activities indirectly related to tourism, the total tourist demand will generate EUR 2.1 billion of added value in 2028 (an increase of 59% compared to 2019). The Ministry of Economic Development and Technology, responsible for tourism policy, is preparing an Action Plan for the implementation of the strategy. The Action Plan will be evaluated every two years.

Statistical Profile

Slovenia: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism¹					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	1 513	1 508	1 528	1 849	2 171
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	4 523	4 519	4 405	5 850	6 457
Hotels and similar establishments	3 926	3 934	3 815	4 983	5 630
Other collective establishments	597	584	589	867	826
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	3 991	4 425	4 702	1 216	1 832
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	437	506	585	289	414
Austria	373	382	396	143	171
Italy	608	599	597	159	162
Netherlands	151	185	187	45	108
Croatia	195	219	235	82	63
Nights in all types of accommodation	9 685	11 176	11 371	3 354	4 794
Hotels and similar establishments	8 452	9 826	9 923	2 802	3 844
Other collective establishments	1 233	1 350	1 448	552	950
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	5 410	5 409	6 049	1 892	3 032
Overnight visitors (tourists)	3 013	3 188	3 170	1 138	2 125
Same-day visitors (excursionists)	2 397	2 221	2 879	754	907
Top destinations					
Croatia	1 680	1 732	1 572	817	1 270
Bosnia and Herzegovina	142	142	200	..	183
Italy	208	236	289	87 e	120
Austria	171	204	189	50 e	79
Germany	168	191	140	..	60 e
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	2 688	2 870	2 998	1 241	..
International travel receipts	2 523	2 704	2 843	1 200	1 513
International passenger transport receipts	164	166	155	41	..
Outbound tourism					
Total international expenditure	1 443	1 585	1 583	750	..
International travel expenditure	1 322	1 483	1 500	718	877
International passenger transport expenditure	120	103	83	33	..

.. Not available; e Estimated value

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/7bft9c>

Slovenia: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	13 801 p	65 848	68 150	69 253	62 058	66 354
Accommodation services for visitors	848 p	16 987	17 570	17 796	14 251	16 396
Hotels and similar establishments	751 p	9 818	10 235	10 378	8 870	10 871
Food and beverage serving industry	7 341 p	24 495	25 322	26 106	22 588	24 693
Passenger transport	1 068 p	5 438	5 826	5 420	4 778	4 696
Air passenger transport	113 p	610	736	302	291	312
Railways passenger transport	1 p	.. c	.. c	.. c	.. c	.. c
Road passenger transport	889 p	4 133	4 430	4 449	3 846	3 767
Water passenger transport	65 p	.. c	.. c	.. c	.. c	.. c
Passenger transport supporting services	423 p	3 097	3 126	3 191	5 078	4 965
Transport equipment rental	307 p	435	469	489	457	474
Travel agencies and other reservation services industry	848 p	2 060	2 257	2 368	1 683	1 791
Cultural industry	2 383 p	8 073	8 197	8 372	8 263	8 278
Sports and recreation industry	583 p	5 263	5 383	5 511	4 960	5 061
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; c Confidential data; p Provisional data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/92xobc>

Slovenia: Internal tourism consumption

Million EUR

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	1 326	1 506	2 908
Tourism characteristic products	928	627	1 632
Accommodation services for visitors	263	246	555
Food and beverage serving services	295	190	486
Passenger transport services	189	55	244
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	27	12	39
Cultural services	70	11	112
Sports and recreation services	84	112	197
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	398	879	1 277
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/ag9whn>



From:

OECD Tourism Trends and Policies 2022

Access the complete publication at:

<https://doi.org/10.1787/a8dd3019-en>

Please cite this chapter as:

OECD (2022), "Slovenia", in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/d5fb3212-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area. Extracts from publications may be subject to additional disclaimers, which are set out in the complete version of the publication, available at the link provided.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.