

# Slovenia

## Tourism in the economy

In 2016, Slovenia recorded more than 4.3 million overnight tourist arrivals, with over two-thirds of this number being inbound visitors (a 12% increase on 2015). Out of a total of 11.2 million nights in all means of accommodation, 7.3 million were generated by foreign tourists (up 11% on 2015) and 3.8 million by domestic tourists (up 3% on 2015). Tourism revenue is growing at a moderate pace, approximately 4% per year.

The largest visitor flows are from Slovenia's neighbouring countries, including Italy (up 7.9% on 2015 for overnight stays), Austria (up 7.3% on 2015) and Germany (up 7.1% on 2015). Together they generate 37.7% of total overnight international arrivals. Slovenian's undertook 5.4 million outbound trips in 2016, an increase of 10.1% from the previous year.

Tourism GDP increased by 4.4% between 2012 and 2014, to EUR 1.8 billion, representing 4.9% of total GDP. Total direct tourism employment increased from 48 700 jobs (6.1% of total employment) in 2014, to 51 800 in 2016 (up 6.3%). According to Bank of Slovenia data, export of travel services increased to EUR 2.3 billion in 2016 (up 3.9% from 2015), accounting for more than one third of all services exports, and 7% of total exports. The surplus of trade in travel services also increased in 2016 in year-on-year terms to EUR 1.5 billion.

## Tourism governance and funding

The Ministry of Economic Development and Technology (MEDT) is the main governmental body responsible for producing and implementing national tourism policy as part of overall economic policy. Given the cross-cutting nature of tourism, it is regulated by a number of national laws requiring permanent cross-sectoral coordination. Legislation requires the adoption and implementation of a Tourism Strategy for a five-year period.

Strategic planning for Slovenian tourism policy reflects a partnership between the public and private sectors, and NGOs. The MEDT co-operates and consults primarily with the Chamber of Tourism and Hospitality, the Chamber of Craft and Small Business and the Tourism Association of Slovenia, engage in the strategic planning of tourism policy.

The promotion of Slovenia as a tourism destination and the corresponding marketing activities are the responsibility of the Slovenian Tourist Board (STB), a public agency which operates six offices in Europe and works with other promotional offices worldwide. The STB is also responsible for the infrastructure of tourist information, coordinating products, stakeholder networking and undertaking research and development.

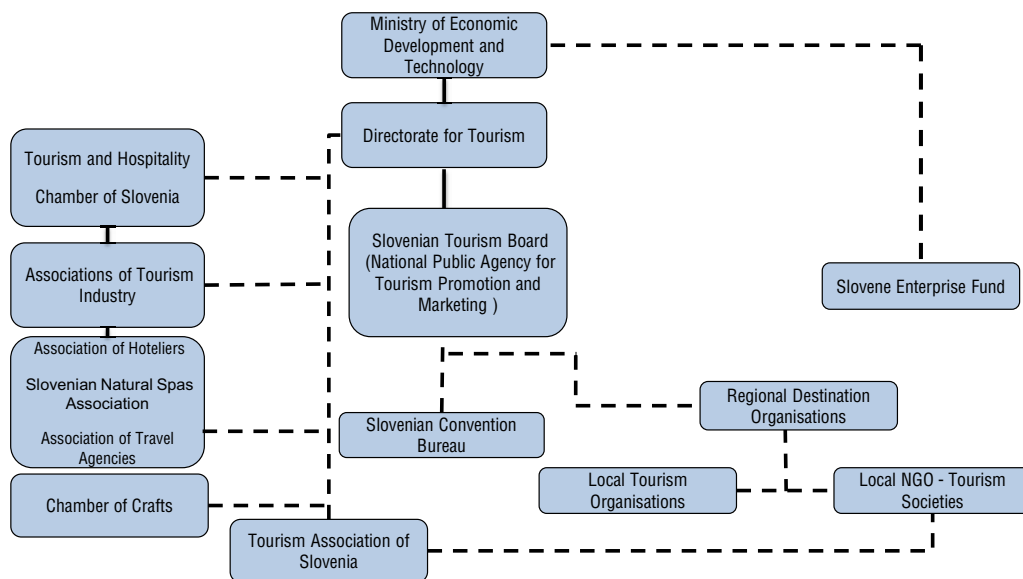
Tourism development at regional level is undertaken by twelve Regional Development Agencies which are responsible to Regional Councils comprised of Mayors of local communities. Regional tourism development is governed by national legislation and the national development objectives of Slovenian tourism, which include some specific

regional development objectives. The MEDT has sought to establish Regional Destination Organisations (RDOs) with the aim of achieving better integration of local tourism destinations. RDOs now operate specific development and marketing programmes and destination brands in each of the twelve statistical regions.

At the local level, each mayor and community council is responsible for tourism development according to national legislation and national strategic objectives. A locally collected tourist accommodation tax goes directly to the community budget. It is the main financial source for local tourism development and is dedicated for this purpose, including construction of information centres, trails, parks, and sports facilities, along with local marketing activities. In 2016, the tourist tax receipts amounted to EUR 11.8 million.

The national budget for promotion and development of tourism in 2017 is EUR 16.1 million, including EUR 11.4 million for marketing and development of tourism and EUR 2.2 million for the Slovenian Tourism Board. In addition, European funds to the value of EUR 2.5 million have been allocated for the creation of new tourism projects and the development of tourism infrastructure.

### Slovenia: Organisational chart of tourism bodies



Source: OECD, adapted by the Ministry of Economic Development and Technology, 2018.

## Tourism policies and programmes

The Government of the Republic of Slovenia adopted in October 2017 the new Development Strategy for Sustainable Growth of Slovenian Tourism 2017-2021. The primary objective of which is to increase the competitiveness and visibility of Slovenian tourism. The key task of the Government is to provide a conducive environment for business and investment in all sectors, including tourism. This implies an appropriate regulatory framework and development incentives for investment. The strategy will focus on five key policy areas:

- **Organisation.** Reorganising the structure of tourism in Slovenia, into four macro regions with the greatest potential for development: Alpine Slovenia, Mediterranean Slovenia, Thermal Pannonian Slovenia, and Central Slovenia with the capital Ljubljana.

- Institutional and legal issues. Reducing administrative barriers to improve the development of tourism SMEs, including rules on the categorisation of accommodation establishments and on minimum technical conditions for catering and tourism business activities. Revising current legislation including a new Promotion of Tourism Development Act, new *Lipica Stud Farm Act* and an amended Hospitality Industry Act.
- Investment. Launching a new cycle of investment in both greenfield and brownfield sites for the development of tourism infrastructure, including private and public investments.
- Small and medium-sized enterprises (SMEs). Promoting the development of new tourism SMEs, and the development of competitiveness and productivity of existing tourism SMEs.
- Human resource development. Promoting the training and education of tourism personnel in line with the needs of tourism enterprises, and promoting vocational education and skills for tourism.

One of the key activities of the Slovenian Tourist Board in 2016 was the promotion of Slovenia as a green, active and healthy boutique destination. At the core of the promotional activities was the digital campaign, “Slovenia – Make New Memories”, which the Slovenian Tourist Board implemented in co-operation with the Slovenian tourism industry in thirteen international markets.

A number of key policies and actions have been identified for the next five year programme. These include:

- Promotion of investments in sustainable and innovative tourist offers/services, in line with brand positioning embodied in the above promotion,
- Introduction of new information technologies in the field of promotion and marketing of national tourism,
- Transport policy measures that will affect tourism, including support for the development and establishment of new air, rail, maritime and other transport routes and services to improve accessibility and investment in the renovation and construction of cableways and cycle networks,
- Associated actions related to cultural policy, including investment in the renovation of built cultural heritage of particular significance to tourism, such as castles, manors, monasteries, etc.,
- New investments in tourist information centres and in infrastructure for congress tourism.

### **Seeking green, quality and year round tourism investment in Slovenia**

In positioning Slovenia as a boutique destination in the heart of Europe, one of the main challenges will be attracting new investment in tourism infrastructure within the four principal regions. The most visited facilities are health resorts, seaside resorts and mountain resorts, and all require investment in tourism infrastructure that meets Slovenia’s positioning as “Green, active and healthy”. Slovenia needs new investment in building new accommodation capacity, renovating the existing accommodation portfolio, and in new tourist attractions and general infrastructure. Within this framework and brand positioning, the Government will particularly promote investment that is environmentally sustainable, of high quality, and capable of attracting interest outside the main tourist seasons. The aim will be to “de-season” Slovenian tourism while improving the competitiveness, productivity and sustainability of tourism SMEs.

## Statistical profile

Table 1. Slovenia: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	1 142	1 126	1 113	1 221	1 285
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	3 733	3 617	3 500	3 727	3 838
Hotels and similar establishments	2 046	1 973	1 945	2 052	2 097
Specialised establishments	..	..	..	..	..
Other collective establishments	1 553	1 497	1 413	1 511	1 548
Private accommodation	135	148	142	164	193
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	2 156	2 259	2 411	2 707	3 032
Same-day visitors (excursionists)	..	..	..	..	..
<b>Top markets</b>					
Italy	414	414	443	484	524
Austria	240	243	266	283	311
Germany	238	243	251	282	307
Croatia	114	119	120	136	153
United Kingdom	69	75	76	94	109
Nights in all types of accommodation	5 777	5 962	6 090	6 614	7 342
Hotels and similar establishments	4 150	4 202	4 294	4 540	4 985
Specialised establishments	..	..	..	..	..
Other collective establishments	1 274	1 342	1 332	1 496	1 642
Private accommodation	354	418	464	578	716
<b>Outbound tourism</b>					
Total international departures	4 465	4 440	4 672	4 909	5 408
Overnight visitors (tourists)	2 474	2 612	2 642	2 867	2 853
Same-day visitors (excursionists)	1 991	1 828	2 030	2 042	2 555
<b>Top destinations</b>					
Croatia	1 351	1 449	1 494	1 614	1 660
Italy	152	170	157	217	152
Austria	132	203	162	189	149
Bosnia and Herzegovina	128	143	129	132	117 e
Germany	121	91	117	109	103
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	2 138	2 185	2 218	2 274	2 371
International travel receipts	2 008	2 043	2 060	2 098	2 190
International passenger transport receipts	130	141	158	176	181
<b>Outbound tourism</b>					
Total international expenditure	846	815	864	948	1 015
International travel expenditure	730	708	745	823	854
International passenger transport expenditure	116	107	119	126	161

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933641127>

Table 2. **Slovenia: Enterprises and employment in tourism**

	Number of establishments <sup>1</sup>	Number of persons employed				
	2015	2012	2013	2014	2015	2016
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>16 121</b>	<b>48 402</b>	<b>47 433</b>	<b>48 749</b>	<b>49 693</b>	<b>51 803</b>
Accommodation services for visitors	2 425	10 064	9 567	9 426	9 676	9 833
Hotels and similar establishments	451	8 899	8 404	8 268	8 448	8 559
Food and beverage serving industry	8 319	20 996	20 727	21 651	22 118	23 533
Passenger transport	1 195	.. c	4 805	.. c	5 012	5 115
Air passenger transport	81	533	503	539	552	553
Railways passenger transport	1	.. c	.. c	.. c	.. c	.. c
Road passenger transport	1 046	3 682	3 621	3 798	3 791	3 910
Water passenger transport	67	.. c	.. c	.. c	.. c	.. c
Passenger transport supporting services	382	2 807	2 812	2 889	2 919	2 958
Transport equipment rental	211	.. c	235	.. c	314	312
Travel agencies and other reservation services industry	939	1 847	1 801	1 809	1 898	1 985
Cultural industry	2 095	4 137	4 222	4 400	4 477	4 679
Sports and recreation industry	555	3 399	3 264	3 251	3 280	3 388
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available; c Confidential data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933641146>Table 3. **Slovenia: Internal tourism consumption**

Million EUR

	2014		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>1 107</b>	<b>2 408</b>	<b>3 587</b>
Tourism characteristic products	749	1 094	1 916
Accommodation services for visitors	116	392	556
Food and beverage serving services	195	297	492
Passenger transport services	243	102	346
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	66	22	87
Cultural services	47	21	93
Sports and recreation services	81	261	342
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	358	1 314	1 671
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933641165>



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